



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF FINANCE AND OPERATIONS
OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

*Modification to Update Key Personnel
91990022C0015*

MEMORANDUM

Date: March 30, 2023
To: Contract File
From: Katie Opper, Contract Specialist
Contract Number: 91990022C0015
Contractor: Mathematica
Modification Amount: \$0.00
Total Contract Amount: \$23,000,000
FY22 AP Tracking Codes:
Contract Type: Cost Plus Fixed Fee

Contract Background:

This contract (91990022C0015), Regional Education Laboratories (REL) Central was awarded on January 3, 2022 to Mathematica. This cost plus fixed fee contract supports the REL activities in applied research, Training, Coaching, and Technical Support for Use of Research, and dissemination.

Purpose:

The purpose of this modification is to update the Task 4 Lead from Virginia Knechtel to Dr. Stephen Lipscomb, effective April 1, 2023.

Authority:

All Changes are made as a Supplemental Agreement under the authority of FAR 52.243-2 Alternate I: Changes – Cost Reimbursement.

Funding:

There are no funding requirements for this modification.

Scope of Work:

This modification does not affect the scope of work.

Approved By:



Revoked certificate

X Katie Opper

Katie Opper

Contracting Officer

Signed by: Office of Finance and Operations

| AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT | | | | 1. CONTRACT ID CODE | | PAGE OF PAGES | |
|--|--|-------------------|--|--|--|--|--|
| | | | | 1 | | 7 | |
| 2. AMENDMENT/MODIFICATION NUMBER | | 3. EFFECTIVE DATE | | 4. REQUISITION/PURCHASE REQUISITION NUMBER | | 5. PROJECT NUMBER (If applicable) | |
| 91990022C0015P00004 | | MAR 30, 2023 | | | | | |
| 6. ISSUED BY | | CODE | | 7. ADMINISTERED BY (If other than Item 6) | | CODE | |
| US Dept of ED-550 12th Street SW - Room 7169 | | CAMP | | See Block 6 | | | |
| Washington DC 20065 | | | | | | | |
| 8. NAME AND ADDRESS OF CONTRACTOR (Number, street, county, State and ZIP Code) | | | | | | 9A. AMENDMENT OF SOLICITATION NUMBER | |
| MATHEMATICA INC. | | | | | | | |
| 600 ALEXANDER PARK | | | | | | 9B. DATED (SEE ITEM 11) | |
| SUITE 100 | | | | | | | |
| PRINCETON NJ 08540 | | | | | | 10A. MODIFICATION OF CONTRACT/ORDER NUMBER | |
| | | | | | | 91990022C0015 | |
| | | | | | | 10B. DATED (SEE ITEM 13) | |
| CODE 00000011 | | | | FACILITY CODE | | MAR 02, 2022 | |
| 11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS | | | | | | | |
| <input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended. <input type="checkbox"/> is not extended. | | | | | | | |
| Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: | | | | | | | |
| (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; | | | | | | | |
| or (c) By separate letter or electronic communication which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE | | | | | | | |
| RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If | | | | | | | |
| by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or electronic communication, provided each letter or electronic | | | | | | | |
| communication makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified. | | | | | | | |
| 12. ACCOUNTING AND APPROPRIATION DATA (If required) | | | | | | | |
| See Schedule | | | | | | | |
| Modification Amount: \$0.00 | | | | | | | |
| Modification Obligated Amount: \$0.00 | | | | | | | |
| 13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NUMBER AS DESCRIBED IN ITEM 14. | | | | | | | |
| CHECK ONE | | | | | | | |
| <input type="checkbox"/> A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NUMBER | | | | | | | |
| IN ITEM 10A. | | | | | | | |
| <input type="checkbox"/> B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation | | | | | | | |
| data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). | | | | | | | |
| <input checked="" type="checkbox"/> C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: | | | | | | | |
| FAR 52.243-2 Changes | | | | | | | |
| <input type="checkbox"/> D. OTHER (Specify type of modification and authority) | | | | | | | |
| | | | | | | | |
| E. IMPORTANT: Contractor <input type="checkbox"/> is not <input checked="" type="checkbox"/> is required to sign this document and return 1 copies to the issuing office. | | | | | | | |
| 14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) | | | | | | | |
| Please see attached. | | | | | | | |
| Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect. | | | | | | | |
| 15A. NAME AND TITLE OF SIGNER (Type or print) | | | | 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) | | | |
| Lisa B Sheldone, Director, Contract Administration | | | | Katie Oppen, Contracting Officer | | | |
| | | | | 202-987-0207 Katie.Oppen@ed.gov | | | |
| 15B. CONTRACTOR/OFFEROR | | 15C. DATE SIGNED | | 16B. UNITED STATES OF AMERICA | | 16C. DATE SIGNED | |
| Lisa B Sheldone | | 4/4/2023 | | KATIE OPPEN | | MAR 30, 2023 | |
| Digitally signed by Lisa B Sheldone | | | | Digitally signed by KATIE OPPEN | | | |
| Date: 2023.04.04 18:20:13 | | | | Date: 2023.04.05 10:05:49 -04'00' | | | |
| -04'00' | | | | | | | |
| (Signature of person authorized to sign) | | | | (Signature of Contracting Officer) | | | |

The purpose of this modification is to update the Task 4 Lead from Virginia Knechtel to Dr. Stephen Lipscomb, effective April 1, 2023.

Except as provided herein, all other terms and conditions of contract 91990022C0015 remain unchanged and in full force and effect.

**Contractor Statement of
Release**

In consideration of the modification agreed to herein as complete Equitable Adjustments, the contractor hereby releases the Government from any and all liability under this contract for further adjustments attributable to such facts or circumstances giving rise to this change.

SCHEDULE Continued

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| ITEM NO. | SUPPLIES/SERVICES | QUANTITY | UNIT | UNIT PRICE | AMOUNT |
|----------|--|----------|------|------------|--------|
| | <p>Contracting Officer: Katie Opper, 202-987-0207, Katie.Opper@ed.gov</p> <p>Primary Contracting Officer Representative: Amy Johnson, 202-208-7849, amy.johnson@ed.gov</p> <p>Alternate Contracting Officer Representative(s): Elizabeth Nolan, 312-730-1532, Elizabeth.Nolan@ed.gov</p> <p>Primary Technical Point of Contact: Lauren Angelo, 202-219-2180, Lauren.Angelo@ed.gov</p> <p>Alternate Technical Point(s) of Contact: None</p> | | | | |

ED 002652

| | |
|---|---|
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| H.1 3452.243-70 KEY PERSONNEL (MAY 2011)..... | 5 |
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SECTION H

SPECIAL CONTRACT REQUIREMENTS

H.1 3452.243-70 KEY PERSONNEL (MAY 2011)

(a) The personnel designated as key personnel in this contract are considered to be essential to the work being performed hereunder. Prior to diverting any of the specified individuals to other programs, or otherwise substituting any other personnel for specified personnel, the contractor shall notify the contracting officer reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the contract effort. No diversion or substitution shall be made by the contractor without written consent of the contracting officer; provided, that the contracting officer may ratify a diversion or substitution in writing and that ratification shall constitute the consent of the contracting officer required by this clause. The contract shall be modified to reflect the addition or deletion of key personnel.

(b) The following personnel have been identified as Key Personnel in the performance of this contract:

| Labor Category | Name |
|------------------|------|
| See Attachment C | |

(End of Clause)

SECTION J
LIST OF ATTACHMENTS

J.1 Attachment C Key Personnel

Key Personnel

Philip Herman- REL Director, Task 2 Lead

Susan Lopez- REL Deputy Director, Task 1 Lead

Stephen Meyer- Task 3 Lead

Stephen Lipscomb - Task 4 Lead

Philip Gleason- Task 5 Lead

Kirsten Miller - Task 6 Lead

Contractor Responsibility Assessment for Mathematica Inc 7/18/2023

Legend

No Issues Found

Potential Issues

Excluded

Instructions

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FEDDATA CHECK

ED 002657



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

| Vendor | Vendor Address | SAM Dates |
|---|--|---|
| Mathematica Inc. DUNS: ueiSAM: T41EGEAK2L35 | 600 Alexander Park Princeton, NJ 08540-6346 Congressional District: 12 | Activation Date: 9/15/2022 8:00:00 PM Expiration Date: 9/14/2023 |

SAM Warnings as of 7/18/2023 8:22:55 AM

| Vendor Designations * | True - <input checked="" type="checkbox"/> False - <input type="checkbox"/> |
|--|---|
| Exclusion Vendor is found to have an existing exclusion record. The next page provides details | <input type="checkbox"/> |
| Debt Subject to Offset | <input type="checkbox"/> |
| 52.209-11.b.1 - federal tax delinquency, current The Offeror represents that it is a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability. | <input type="checkbox"/> |
| 52.209-11.b.2 - convicted of a felony, last 2 years The Offeror represents that it is a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months. | <input type="checkbox"/> |
| 52.209-5.a.1.i.A - presently debarred... The Offeror certifies, to the best of its knowledge and belief, that they are presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency | <input type="checkbox"/> |
| 52.209-5.a.1.i.B - criminal offense..., last 3 years The Offeror certifies, to the best of its knowledge and belief, that they have, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) contract or subcontract; violation of Federal or State antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property. | <input type="checkbox"/> |
| 52.209-5.a.1.i.C - presently indicted The Offeror certifies, to the best of its knowledge and belief, that they are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision | <input type="checkbox"/> |
| 52.209-5.a.1.i.D - federal tax delinquency, last 3 years The Offeror certifies, to the best of its knowledge and belief, that they have, within a three-year period preceding this offer, been notified of any delinquent Federal taxes in an amount that exceeds \$3,500 for which the liability remains unsatisfied. | <input type="checkbox"/> |
| 52.209-5.a.1.ii - term for default, last 3 years The Offeror has, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency. | <input type="checkbox"/> |
| FAR 52.204-26.c.1 and/or 52.212-3.v.2.i Covered Telecommunications Equipment or Services The Offeror represents that it does provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument. | <input type="checkbox"/> |
| FAR 52.204-26.c.2 and/or 52.212-3.v.2.ii Covered Telecommunications Equipment or Services After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it does use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services. | <input type="checkbox"/> |
| Vendor has at least one SAM R/Q record or FPDS Termination for Cause or Default The next page provides details | <input type="checkbox"/> |

*See Appendix A for what is required for each of the above SAM designations.





Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

SAM Responsibility / Qualification (Formerly FAPIIS) Summary

| Record Type | Count |
|--|-------|
| Administrative Agreement | 0 |
| Defective Pricing | 0 |
| DoD Determination of Contractor Fault | 0 |
| Information on Trafficking in Persons | 0 |
| Non-Responsibility Determination | 0 |
| Recipient Not-Qualified Determination | 0 |
| Subcontractor Payment Issues | 0 |
| Termination for Cause | 0 |
| Termination for Default | 0 |
| Termination for Material Failure to Comply | 0 |

SAM Responsibility / Qualification (Formerly FAPIIS) Details

| Record Type | PIID | Ref PIID | Recorded On |
|--------------------|------|----------|-------------|
| No Data to Display | | | |

FPDS Details

| Record Type | PIID | Recorded On |
|--------------------|------|-------------|
| No Data to Display | | |

FPDS data, from the prior five years, is accurate as of 7/16/2023 & and all SAM R/Q data is accurate as of 7/17/2023 10:02:09 AM

Disclaimer

If adverse action is considered as a result of information in this report it is recommended that contracting personnel: 1) per FAR 9.104-5 promptly request additional, possibly clarifying information from the offeror, and 2) validate the information in SAM and/or FPDS for accuracy and recency.

This Report is based on data and information obtained from U.S. federal databases, including the Federal Procurement Data System database and the System for Award Management database. This Report is provided "as is". FedDataCheck and PotomacWave Consulting Inc. make no representation or warranty, express, implied or otherwise, as to the accuracy or completeness of the data and information contained in this Report. Any alert or warning identified in this Report should be independently verified -- per FAR 9.104-5(a)(1) and per FAR 9.104-5(b)(1) requests for additional information from the offeror should be made promptly. To the extent any alert or warning identified in this Report contains or may contain an error or inaccuracy, the relevant U.S. federal agency should be contacted to correct such error or inaccuracy. FedDataCheck and PotomacWave Consulting Inc. shall have no liability to any party resulting from the use of, or content contained in, this Report, and any action taken by (or omission of) a party relying on this Report shall be the sole responsibility of such party.



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Self Certified Business Types

| Business Type | SAM Glossary Definition |
|--------------------------|--|
| Business or Organization | |
| For Profit Organization | A For-Profit Organization is one that distributes any profit not reinvested into the business as profit or dividends to its employees or shareholders. |
| Subchapter S Corporation | Subchapter S Corporations are corporations that elect to pass corporate income, losses, deductions and credit through to their shareholders for federal tax purposes. For more information please see: http://www.irs.gov/businesses/small/article/0,,id=98263,00.html |

Certified Business Types

| Business Type | Certified By | Last Verified Date / Entry Date | Expiration Date / Exit Date |
|---------------|--------------|---------------------------------|-----------------------------|
| No Results | | | |

SBA Certified Business Types include: SBA Certified 8(a) Joint Venture; SBA Certified 8(a) Program Participant; SBA Certified Hub Zone Firm



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Small Business Representations

The Small Business Administration (SBA), through public rule-making, assigns thresholds to the individual NAICS codes that are used to assess if entities may be considered a small business in certain classification areas. The below list shows business size classifications by NAICS code for this vendor in SAM.gov.

| NAICS Code | NAICS desc | Exception String | Small Business* |
|------------|--|------------------|-----------------|
| 518210 | Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services | | N |
| 541511 | Custom Computer Programming Services | | N |
| 541512 | Computer Systems Design Services | | N |
| 541513 | Computer Facilities Management Services | | N |
| 541519 | Other Computer Related Services | NN | N |
| 541611 | Administrative Management and General Management Consulting Services | | N |
| 541618 | Other Management Consulting Services | | N |
| 541690 | Other Scientific and Technical Consulting Services | | N |
| 541714 | Research and Development in Biotechnology (except Nanobiotechnology) | | N |
| 541720 | Research and Development in the Social Sciences and Humanities | | N |
| 541990 | All Other Professional, Scientific, and Technical Services | | N |
| 611430 | Professional and Management Development Training | | N |
| 611710 | Educational Support Services | | N |
| 624110 | Child and Youth Services | | N |

* Small Business Size is determined by the values in SAM for each NAICS unless there is an exception. In that case, the size is determined by: all Y in exception string then it is a small business; all N in exception string then it is not a small business; and a combination of Y and N will result in an Unknown (U) business size.



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Contact Information from SAM

| Contact Type | Name | Phone / Fax | Email | Address |
|-------------------------------|-------------------|-------------|-------|--|
| Alternate Electronic Business | PAMELA TAPSCOTT | | | 1100 1ST STREET NE 12TH FLOORWASHINGTON, DC 20002 |
| Alternate Government Business | RFP Center | | | PO BOX 2393 PRINCETON, NJ 08543 |
| Alternate Past Performance | PAMELA TAPSCOTT | | | 1100 1ST STREET NE 12TH FLOORWASHINGTON, DC 20002 |
| Electronic Business | Diana Montes-Cruz | | | PO BOX 2393 PRINCETON, NJ 08543 |
| Government Business | Diana Montes-Cruz | | | P.O. BOX 2393 PRINCETON, NJ 08543 |
| Past Performance | Diana Montes-Cruz | | | PO BOX 2393 PRINCETON, NJ 08543 |

Vendor Contact Information from NITAAC

| Contact Type | Name | Phone | Email | Address |
|------------------------------|------|-------|-------|---------|
| No contact information found | | | | |
| Program Manager | | | | |

Vendor Contact Information from GSA e-Library

| Contact Type | Name | Phone | Email | Address |
|--------------|--------------|----------------|-------------------------------|--|
| OASIS | Not Provided | (609) 799-3535 | RFPCenter@mathematica-mpr.com | 600 ALEXANDER PARK, PRINCETON, NJ 08540-6346 |

Vendor Cage Information from SAM

| DUNS + 4 | Cage | Address Type | Address |
|----------|-------|--------------|--|
| - | 1EFX9 | Physical | 600 Alexander Park, Princeton, NJ 08540 - 6346 |
| - | 1EFX9 | Mailing | 600 ALEXANDER PARK, PRINCETON, NJ 08540 - 6346 |





Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Buy American Certificates and Trade Agreements Certificates

Foreign End Product Response (52.212-3.f)

Are any end products delivered to the Government by Mathematica Inc. foreign (nondomestic) end products?

No

Foreign End Products Supplied by Vendor as designated in SAM

The following are end products that the contractor has designated in SAM that are sourced from a foreign country. A check mark signifies the contractor has included that product in their FAR response to that section in SAM. FAR 52.212.3.f refers to Buy American Certificates and FAR 52.212.3.g refers to Buy American and/or Trade Agreements Certificates.

End Product

Country

No End Products in SAM

[Please reference FAR 52.212-3 for guidance](#)



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS Overview for Current and the Prior Fiscal Year

| US Contracting Department | Obligated Amount | Transactions |
|---|------------------|--------------|
| Agency For International Development | \$0 | 1 |
| Agriculture | \$1,319,755 | 6 |
| Education | \$50,512,539 | 52 |
| General Services Administration | \$0 | 3 |
| Health And Human Services | \$170,766,703 | 202 |
| Labor | \$2,126,698 | 11 |
| Millenium Challenge Corporation | \$3,181,949 | 27 |
| National Science Foundation | \$2,671,711 | 9 |
| Social Security Administration | \$13,468,161 | 20 |
| NAICS | Obligated Amount | Transactions |
| 541211 - Offices of Certified Public Accountants | \$2,004,382 | 9 |
| 541330 - Engineering Services | \$0 | 1 |
| 541511 - Custom Computer Programming Services | \$6,037,778 | 3 |
| 541611 - Administrative Management and General Management Consulting Services | \$61,817,890 | 127 |
| 541618 - Other Management Consulting Services | \$0 | 2 |
| 541690 - Other Scientific and Technical Consulting Services | \$24,286,979 | 40 |
| 541720 - Research and Development in the Social Sciences and Humanities | \$117,395,274 | 121 |
| 541990 - All Other Professional, Scientific, and Technical Services | \$13,305,226 | 20 |
| 611410 - Business and Secretarial Schools | \$9,520,096 | 4 |
| 611710 - Educational Support Services | \$9,679,892 | 4 |
| PSC | Obligated Amount | Transactions |
| AF11 - R&D- Education: Educational (Basic Research) | \$4,420,776 | 11 |
| AN41 - R&D- Medical: Health Services (Basic Research) | \$672,604 | 4 |
| AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development) | \$68,066,028 | 30 |
| AN46 - R&D- Medical: Health Services (Management/Support) | \$2,004,382 | 6 |
| B529 - Special Studies/Analysis- Scientific Data | \$13,213,192 | 13 |
| B542 - Special Studies/Analysis- Educational | \$1,748,822 | 6 |
| B599 - Special Studies/Analysis- Other | \$0 | 3 |
| H176 - Quality Control- Books, Maps, And Other Publications | (\$198,512) | 1 |
| Q101 - Medical- Dependent Medicare | \$0 | 2 |



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

| PSC | Obligated Amount | Transactions |
|---|------------------|--------------|
| R405 - Support- Professional: Operations Research/Quantitative Analysis | (\$96,171) | 5 |
| R406 - Support- Professional: Policy Review/Development | (\$129,522) | 3 |
| R408 - Support- Professional: Program Management/Support | \$0 | 4 |
| R410 - Support- Professional: Program Evaluation/Review/Development | \$27,492,178 | 86 |
| R425 - Support- Professional: Engineering/Technical | \$1,153,451 | 1 |
| R426 - Support- Professional: Communications | \$0 | 2 |
| R499 - Support- Professional: Other | \$123,580,039 | 147 |
| R699 - Support- Administrative: Other | (\$313) | 2 |
| R706 - Support- Management: Logistics Support | \$0 | 1 |
| R799 - Support- Management: Other | \$2,120,561 | 4 |



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS Details (Most recent 25 transactions shown)

| Contracting Department | Contract Identification Info | Date Signed | Obligated Amount | NAICS & PSC | Contract description on base award |
|---------------------------------|--|-------------|------------------|--|--|
| Labor | 1605TA21F00078 P00009 DOLOPS16D0020 | 07/13/2023 | \$0 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R499 - Support- Professional: Other | TASK ORDER FOR EFAST SYSTEM |
| Millenium Challenge Corporation | 95332418C0221 P00007 | 07/10/2023 | (\$90,929) | NAICS: 541690 - Other Scientific and Technical Consulting Services PSC: R410 - Support- Professional: Program Evaluation/Review/Development | IGF::OT::IGF POST-COMPACT EVALUATION CHECKING THE ENGINEERING AND ECONOMIC VIABILITY OF THE TANZANIA I ROADS PROJECT |
| Health And Human Services | 75FCMC20F0001 P00005 75FCMC19D0091 | 07/10/2023 | \$0 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: R499 - Support- Professional: Other | EVALUATION OF THE MEDICARE CARE CHOICES MODEL |
| Health And Human Services | 75FCMC20F0002 P00007 75FCMC19D0091 | 07/05/2023 | \$2,331,553 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: R499 - Support- Professional: Other | MEDICAID AND CHIP (MAC) SCORECARD: PROJECT MANAGEMENT, CONTENT DEVELOPMENT, AND TECHNICAL ASSISTANCE |
| Health And Human Services | 75FCMC22F0110 P00003 75FCMC19D0091 | 07/03/2023 | (\$6,126,054) | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: AN41 - R&D- Medical: Health Services (Basic Research) | EVALUATION OF THE COMMUNITY HEALTH ACCESS AND RURAL TRANSFORMATION (CHART) MODEL |
| General Services Administration | 47QRAD19DU209 PSA859 | 06/30/2023 | \$0 | NAICS: 541211 - Offices of Certified Public Accountants PSC: R408 - Support- Professional: Program Management/Support | ONE ACQUISITION SOLUTION FOR INTEGRATED SERVICES (OASIS) PROFESSIONAL SERVICES MULTIPLE AGENCY CONTRACT |
| Health And Human Services | 75FCMC19D0091 P00009 | 06/28/2023 | \$0 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development) | RESEARCH, MEASUREMENT, ASSESSMENT, DESIGN, AND ANALYSIS (RMADA) 2 |
| Health And Human Services | 75FCMC19D0033 P00005 | 06/28/2023 | \$0 | NAICS: 541618 - Other Management Consulting Services PSC: Q101 - Medical- Dependent Medicare | MATHEMATICA IDIQ |
| Health And Human Services | 75P00122F37068 P00002 HHSP2332015000351 | 06/26/2023 | \$1,975,667 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R499 - Support- Professional: Other | RESEARCH AND EVALUATION SUPPORT FOR OFFICE OF POPULATION AFFAIRS |



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS Details (Most recent 25 transactions shown)

| Contracting Department | Contract Identification Info | Date Signed | Obligated Amount | NAICS & PSC | Contract description on base award |
|-----------------------------|--|-------------|------------------|--|---|
| National Science Foundation | 49100423F0104 0 49100421D0011 | 06/26/2023 | \$1,176,472 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R410 - Support- Professional: Program Evaluation/Review/Development | EVALUATION, ASSESSMENT, AND PROGRAM MANAGEMENT SERVICES - BROADER IMPACTS |
| Health And Human Services | 75FCMC21F0002 P00008 75FCMC19D0091 | 06/23/2023 | \$0 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development) | RESEARCH REGARDING THE EXPERIENCE OF HEALTH CARE AND OTHER SERVICES FOR INDIVIDUALS DUALY ELIGIBLE FOR MEDICARE AND MEDICAID |
| Agriculture | 12319822F0007 P00002 12319822A0001 | 06/21/2023 | \$660,591 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R799 - Support- Management: Other | SNAP EMPLOYMENT AND TRAINING |
| Education | 91990020C0001 P00010 | 06/21/2023 | \$0 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: R410 - Support- Professional: Program Evaluation/Review/Development | THE PURPOSE OF THE CONTRACT IS TO CONDUCT AN IMPLEMENTATION AND IMPACT EVALUATION OF THE PROMISE NEIGHBORHOODS AND FULL-SERVICE COMMUNITY SCHOOLS PROGRAMS. |
| Labor | 1605C120F00035 P00003 DOLOPS16D0020 | 06/16/2023 | \$0 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R499 - Support- Professional: Other | NEW TO NUMBER 5 - OVERSIGHT AND ANALYSIS OF FORM 5500 SERIES DATA PROCESSING |
| Health And Human Services | 75P00122F37070 P00003 HHSP2332015000351 | 06/15/2023 | \$464,247 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R410 - Support- Professional: Program Evaluation/Review/Development | LESSONS LEARNED FROM THE COVID-19 PANDEMIC FOR OS/ASPE |
| Health And Human Services | 75FCMC21F0002 P00007 75FCMC19D0091 | 06/14/2023 | \$818,229 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development) | RESEARCH REGARDING THE EXPERIENCE OF HEALTH CARE AND OTHER SERVICES FOR INDIVIDUALS DUALY ELIGIBLE FOR MEDICARE AND MEDICAID |
| Health And Human Services | 75FCMC21F0004 P00005 75FCMC19D0091 | 06/13/2023 | \$570,591 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: R499 - Support- Professional: Other | THE PURPOSE OF THIS WORK IS TO DEVELOP AND IMPLEMENT THE MONITORING AND REPORTING PROCEDURES FOR THE COMPREHENSIVE CARE FOR JOINT REPLACEMENT MODEL |



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS Details (Most recent 25 transactions shown)

| Contracting Department | Contract Identification Info | Date Signed | Obligated Amount | NAICS & PSC | Contract description on base award |
|---------------------------|--|-------------|------------------|--|--|
| Health And Human Services | 75P00120F37052 P00004 HHSP233201500035I | 06/12/2023 | \$562,331 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R499 - Support- Professional: Other | CONTRIBUTE TO JOINT EFFORTS BETWEEN THE ACF OFFICE OF PLANNING, RESEARCH, AND EVALUATION (OPRE) AND ACF PROGRAM OFFICES TO: CONDUCT SYSTEMATIC NEEDS ASSESSMENT(S) AS AN INPUT TO LEARNING AGENDAS; ANALYZE ACF ADMINISTRATIVE DATA AND INFORMATION COLLEC |
| Health And Human Services | 75R60222F34005 P00002 75R60219D00014 | 06/12/2023 | \$1,412,187 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R410 - Support- Professional: Program Evaluation/Review/Development | HAB82 C 3820. RAPID UPTAKE OF DISSEMINATED INTERVENTIONS IN THE RYAN WHITE HIV/AIDS PROGRAM |
| Health And Human Services | 75FCMC19D0091 P00008 | 06/08/2023 | \$0 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development) | RESEARCH, MEASUREMENT, ASSESSMENT, DESIGN, AND ANALYSIS (RMADA) 2 |
| Health And Human Services | 75P00120F37057 P00007 HHSP233201500035I | 06/02/2023 | \$2,543,634 | NAICS: 541611 - Administrative Management and General Management Consulting Services PSC: R499 - Support- Professional: Other | PSC IDIQ |
| Health And Human Services | 75FCMC22F0002 P00003 75FCMC19D0091 | 06/01/2023 | \$0 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development) | COMPREHENSIVE CARE FOR JOINT REPLACEMENT (CJR) 3-YEAR EXTENSION PAYMENT RECONCILIATION |
| Health And Human Services | 75FCMC22F0001 P00003 75FCMC19D0091 | 05/31/2023 | \$0 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development) | THE PURPOSE OF THIS TASK ORDER IS TO OBTAIN SERVICES TO PROVIDE DATA ANALYTICS SUPPORT AND TECHNICAL ASSISTANCE FOR THE CENTERS FOR MEDICARE & MEDICAID SERVICES (CMS) IN THE IMPLEMENTATION OF SECTION 101(E) OF THE MEDICARE ACCESS AND CHIP REAUTHO |
| Health And Human Services | 75FCMC19F0002 P00006 75FCMC18D0032 | 05/30/2023 | \$1,945,944 | NAICS: 541690 - Other Scientific and Technical Consulting Services PSC: R499 - Support- Professional: Other | MIDS TO VALUE INCENTIVES AND QUALITY REPORTING CENTER: VALIDATION SUPPORT |



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS Details (Most recent 25 transactions shown)

| Contracting Department | Contract Identification Info | Date Signed | Obligated Amount | NAICS & PSC | Contract description on base award |
|------------------------|--------------------------------------|-------------|------------------|---|--|
| Education | 91990018C0057 P00009 | 05/26/2023 | \$1,850,242 | NAICS: 541720 - Research and Development in the Social Sciences and Humanities PSC: R410 - Support- Professional: Program Evaluation/Review/Development | ASSESSING THE EFFECTIVENESS IN EVALUATION OF ADULT EDUCATION STUDY |

Only displaying up to 25 most recent transactions for the vendor from the past 5 years.

FPDS – FAR references involving adverse information



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Appendix A

| SAM Designation | If Box Has a Check Mark... | Source |
|-----------------|---|-------------------------------------|
| Debarred Vendor | <p>If a box has a check mark and is associated with Debarred Vendor see below exclusion details.</p> <p>Ineligible (Proceedings Pending) Nature (Cause) Preliminary ineligible based upon adequate evidence of conduct indicating a lack of business honesty or integrity, or a lack of business integrity, or regulation, statute, executive order or other legal authority, pending completion of an investigation and/or legal proceedings; or based upon initiation of proceedings to determine final ineligibility based upon regulation, statute, executive order or other legal authority or a lack of business integrity or a preponderance of the evidence of any other cause of a serious and compelling nature that it affects present responsibility. Effect Procurement: Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so. Nonprocurement: No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined preliminary ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The termination date will be listed as "Indefinite" (Indef.) unless otherwise specified.</p> <p>Ineligible (Proceedings Completed) Nature (Cause) Determined ineligible upon completion of administrative proceedings establishing by preponderance of the evidence of a cause of a serious and compelling nature that it affects present responsibility; or determined ineligible based on other regulation, statute, executive order or other legal authority. Effect Procurement: Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so. Nonprocurement: No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The period of ineligibility is specified by the termination date.</p> <p>Prohibition/Restriction Nature (Cause) May be subject to sanctions pursuant to the conditions imposed by the U.S. Department of the Treasury (Treasury) Office of Foreign Assets Control (OFAC), or subject to a sanction, restriction or partial denial pursuant to the conditions imposed by the U.S. Department of State (STATE) or Federal agency of the U.S. Government. Effect If you think you have a potential match with an OFAC listing, please visit the following section of OFAC's website for guidance: http://www.treasury.gov/resource-center/faqs/Sanctions/Pages/directions.aspx. For all other prohibitions and restrictions, see the agency note in the Additional Comments field to ascertain the extent or limit on the sanction, restriction or partial denial. If there is no note, contact the agency taking the action for this information.</p> <p>Voluntary Exclusion Nature (Cause) Accepted an agreement to be excluded under the terms of a settlement between the person and one or more agencies. Effect These persons are excluded in accordance with the terms of their voluntary exclusion agreement. See the agency note in the Additional Comments field to ascertain the extent of the exclusion of the limit on the person's participation, in covered transactions. If there is no note, contact the agency taking the action for this information.</p> | SAM Exclusion Types |



Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

| | | |
|---------------------------|--|--|
| 52.204-26 or 52.212-3.v.2 | <p>If a box has a check mark and is associated with FAR 52.204-26 or FAR 52.212-3.v.2</p> <ul style="list-style-type: none"> Federal Register Citation 85 FR 42665 <p>I. Background. Section 889(a)(1)(B) of the John S. McCain National Defense Authorization Act (NDAA) for Fiscal Year 2019 (Pub. L. 115-232) prohibits executive agencies from entering into, or extending or renewing, a contract with an entity that uses any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. The provision goes into effect August 13, 2020.</p> <ul style="list-style-type: none"> FAR 4.2103 (a)(1)(i) If the offeror selects "does not" in response to the provision at 52.204-26 or 52.212-3(v), the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures. FAR 4.2103 (a)(1)(ii) If the offeror selects "does" in response to the provision at 52.204-26 or 52.212-3(v), the offeror must complete the representation at 52.204-24. FAR 4.2103 (a)(2)(i) If the offeror selects "will not" in paragraph (d) of the provision at 52.204-24, the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures. FAR 4.2103 (a)(2)(ii) If an offeror selects "will" in paragraph (d) of the provision at 52.204-24, the offeror must provide the information required by paragraph 52.204-24(e), and the contracting officer shall follow agency procedures. FAR 4.2103 (b) Reporting. If a contractor provides a report pursuant to paragraph (d) of the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment, follow agency procedures. | <p>Federal Register Citation 85 FR 42665</p> <p>FAR 4.2103</p> |
| Debt Subject to Offset | <p>If a box has a check mark and is associated with Debt Subject to Offset</p> <ul style="list-style-type: none"> FAR 32.1108(b)(2)(i) When it is contemplated that the Governmentwide commercial purchase card will be used as the method of payment, and the contract or order is above the micro-purchase threshold, contracting officers are required to verify by looking in the System for Award Management (SAM) whether the contractor has any delinquent debt subject to collection under the Treasury Offset Program (TOP) at contract award and order placement. Information on TOP is available at http://fms.treas.gov/debt/index.html. FAR 32.1108(b)(2) (ii) The contracting officer shall not authorize the Governmentwide commercial purchase card as a method of payment during any period the SAM indicates that the contractor has delinquent debt subject to collection under the TOP. In such cases, payments under the contract shall be made in accordance with the clause at 52.232-33, Payment by Electronic Funds Transfer-System for Award Management, or 52.232-34, Payment by Electronic Funds Transfer-Other Than System for Award Management, as appropriate (see FAR 32.1110(d)). FAR 32.1108(b)(2) (iii) Contracting officers shall not use the presence of the SAM debt flag indicator to exclude a contractor from receipt of the contract award or issuance or placement of an order. FAR 32.1108(b)(2) (iv) The contracting officer may take steps to authorize payment by Governmentwide commercial purchase card when a contractor alerts the contracting officer that the SAM debt flag indicator has been changed to no longer show a delinquent debt. | <p>FAR 32.1108</p> |
| 52.209-11 | <p>If a box has a check mark and is associated with FAR 52.209-11</p> <ul style="list-style-type: none"> FAR 9.104-5(b)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405); FAR 9.104-5(b) (2) Notify, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action; and FAR 9.104-5(b) (3) Not award to the corporation unless an agency suspending or debarment official has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government. | <p>FAR 9.104-5(b)</p> |
| 52.209-5 | <p>If a box has a check mark and is associated with FAR 52.209-5</p> <ul style="list-style-type: none"> FAR 9.104-5(a)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405); and FAR 9.104-5(a)(2) Notify, prior to proceeding with award, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action, where an offeror indicates the existence of an indictment, charge, conviction, or civil judgment, or Federal tax delinquency in an amount that exceeds \$3,500. | <p>FAR 9.104-5(a)</p> |

Market Research and Category Management



Utilizes data from GSA eLibrary to provide contracting vehicles for the contractor

Vendor GSA eLibrary Information

| Source | Title | Contract Number | T&Cs /Pricelist | Contract End Date | Category | View Catalog |
|--------|-------|-----------------|-----------------|-------------------|-----------------------------|--------------------------------|
| OASIS | - | 47QRAD19DU209 | - | 9/2/2024 | OASIS POOL2 | GSA Advantage! |

Reps & Certs from SAM

ED 002675



Certification for: MATHEMATICA INC.

Unique Entity ID: T41EGEAK2L35

Certification Validity From: Wed Sep 14 11:04:33 EDT 2022

Certification Validity To: Thu Sep 14 11:04:33 EDT 2023

I have read each of the FAR and DFARS provisions presented on this page. By submitting this certification, I, **Diana Montes-Cruz**, am attesting to the accuracy of the representations and certifications contained herein, including the entire NAICS table. I understand that I may be subject to criminal prosecution under Section 1001, Title 18 of the United States Code or civil liability under the False Claims Act if I misrepresent **Mathematica Inc.** in any of these representations or certifications to the Government.

By maintaining an active entity registration in SAM, the entity complied with requirements to report proceedings data in accordance with:

- FAR 52.209-7 Information Regarding Responsibility Matters and with requirements to report executive compensation data in accordance with
- FAR 52.204-10 Reporting Executive Compensation and First-Tier Subcontract Awards.

READ ONLY PROVISIONS

| FAR 52.203-11 | Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions (Sep 2007) |
|---------------|--|
|---------------|--|

(a) Definitions. As used in this provision-"Lobbying contact" has the meaning provided at 2 U.S.C. 1602(8). The terms "agency," "influencing or attempting to influence," "officer or employee of an agency," "person," "reasonable compensation," and "regularly employed" are defined in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions"(52.203-12).

(b) Prohibition. The prohibition and exceptions contained in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12) are hereby incorporated by reference in this provision.

(c) Certification. The offeror, by signing its offer, hereby certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on its behalf in connection with the awarding of this contract.

(d) Disclosure. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.

(e) Penalty. Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by 31 U.S.C. 1352. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure required to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

(End of Provision)

ED 002676



As prescribed in 3.909-3(a), insert the following provision: Prohibition on Contracting With Entities That Require Certain Internal Confidentiality Agreements or Statements-Representation (JAN 2017)

(a) Definition. Internal confidentiality agreement or statement, subcontract, and subcontractor, as used in this provision, are defined in the clause at 52.203-19, Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements.

(b) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use funds appropriated (or otherwise made available) for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.

(c) The prohibition in paragraph (b) of this provision does not contravene requirements applicable to Standard Form 312, (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartmented Information Nondisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.

(d) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).

(End of Provision)

As prescribed in 22.1310 (c), insert the following provision:

COMPLIANCE WITH VETERANS' EMPLOYMENT REPORTING REQUIREMENTS (Feb 2016)

By submission of its offer, the offeror represents that, if it is subject to the reporting requirements of 38 U.S.C. 4212(d) (i.e., if it has any contract containing Federal Acquisition Regulation clause 52.222-37, Employment Reports on Veterans), it has filed the most recent VETS-4212 Report required by that clause.

(End of Provision)

As prescribed in 22.1705(b), insert the following provision:

CERTIFICATION REGARDING TRAFFICKING IN PERSONS COMPLIANCE PLAN (Oct 2020)

(a) The term "commercially available off-the-shelf (COTS) item," is defined in the clause of this solicitation entitled "Combating Trafficking in Persons" (FAR clause 52.222-50).

(b) The apparent successful Offeror shall submit, prior to award, a certification, as specified in paragraph (c) of this provision, for the portion (if any) of the contract that-

- (1) Is for supplies, other than commercially available off-the-shelf items, to be acquired outside the United States, or services to be performed outside the United States; and
- (2) Has an estimated value that exceeds \$550,000.

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(c) The certification shall state that

(1) It has implemented a compliance plan to prevent any prohibited activities identified in paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons, and to monitor, detect, and terminate the contract with a subcontractor engaging in prohibited activities identified at paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons; and

(2) After having conducted due diligence, either-

(i) To the best of the Offeror's knowledge and belief, neither it nor any of its proposed agents, subcontractors, or their agents is engaged in any such activities; or

(ii) If abuses relating to any of the prohibited activities identified in 52.222-50(b) have been found, the Offeror or proposed subcontractor has taken the appropriate remedial and referral actions.

(End of Provision)

| | | |
|---------------------|---------------------------------------|-------------------|
| FAR 52.223-1 | Biobased Product Certification | (May 2012) |
|---------------------|---------------------------------------|-------------------|

(a) As required by the Farm Security and Rural Investment Act of 2002 and the Energy Policy Act of 2005 (7 U.S.C. 8102(c)(3)), the offeror certifies, by signing this offer, that biobased products (within categories of products listed by the United States Department of Agriculture in 7 CFR part 3201, subpart B) to be used or delivered in the performance of the contract, other than biobased products that are not purchased by the offeror as a direct result of this contract, will comply with the applicable specifications or other contractual requirements.

(End of Provision)

| | | |
|----------------------|--|-------------------|
| FAR 52.225-20 | Prohibition on Conducting Restricted Business Operations in Sudan-Certification | (Aug 2009) |
|----------------------|--|-------------------|

(a) Definitions. As used in this provision-

"Business operations" means engaging in commerce in any form, including by acquiring, developing, maintaining, owning, selling, possessing, leasing, or operating equipment, facilities, personnel, products, services, personal property, real property, or any other apparatus of business or commerce.

"Marginalized populations of Sudan" means-

(1) Adversely affected groups in regions authorized to receive assistance under section 8(c) of the Darfur Peace and Accountability Act (Pub. L. 109-344) (50 U.S.C. 1701 note); and

(2) Marginalized areas in Northern Sudan described in section 4(9) of such Act.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007 (Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

(1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;

(2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;

(3) Consist of providing goods or services to marginalized populations of Sudan;

(4) Consist of providing goods or services to an internationally recognized peacekeeping force or

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(5) Consist of providing goods or services that are used only to promote health or education; or

(6) Have been voluntarily suspended

(b) Certification. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.

(End of Provision)

| | | |
|----------------------|---|-------------------|
| FAR 52.225-25 | Prohibition on Contracting with Entities Engaging in Certain Activities or Transactions Relating to Iran - Representation and Certifications | (Jun 2020) |
|----------------------|---|-------------------|

(a) Definitions. As used in this provision-

"Person"

(1) Means-

(i) A natural person;

(ii) A corporation, business association, partnership, society, trust, financial institution, insurer, underwriter, guarantor, and any other business organization, any other nongovernmental entity, organization, or group, and any governmental entity operating as a business enterprise; and

(iii) Any successor to any entity described in paragraph (1)(ii) of this definition; and

(2) Does not include a government or governmental entity that is not operating as a business enterprise.

"Sensitive technology"-

(1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-

(i) To restrict the free flow of unbiased information in Iran; or

(ii) To disrupt, monitor, or otherwise restrict speech of the people of Iran; and

(2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).

(b) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.

(c) Except as provided in paragraph (d) of this provision or if a waiver has been granted in accordance with 25.703-4, by submission of its offer, the offeror-

(1) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran;

(2) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act. These sanctioned activities are in the areas of development of the petroleum resources of Iran, production of refined petroleum products in Iran, sale and provision of refined petroleum products to Iran, and contributing to

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(3) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at <https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx>).

(d) Exception for trade agreements. The representation requirement of paragraph (c)(1) and the certification requirements of paragraphs (c)(2) and (c)(3) of this provision do not apply if-

- (1) This solicitation includes a trade agreements notice or certification (e.g., 52.225-4, 52.225-6, 52.225-12, 52.225-24, or comparable agency provision); and
- (2) The offeror has certified that all the offered products to be supplied are designated country end products or designated country construction material.

(End of Provision)

| | | |
|---------------------|--|-------------------|
| FAR 52.227-6 | Royalty Information (Alternate I) | (Apr 1984) |
|---------------------|--|-------------------|

(a) Cost or charges for royalties. When the response to this solicitation contains costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:

- (1) Name and address of licensor.
- (2) Date of license agreement.
- (3) Patent numbers, patent application serial numbers, or other basis on which the royalty is payable.
- (4) Brief description, including any part or model numbers of each contract item or component on which the royalty is payable.
- (5) Percentage or dollar rate of royalty per unit.
- (6) Unit price of contract item.
- (7) Number of units.
- (8) Total dollar amount of royalties.

(b) Copies of current licenses. In addition, if specifically requested by the Contracting Officer before execution of the contract, the offeror shall furnish a copy of the current license agreement and an identification of applicable claims of specific patents.

ALTERNATE I (APR 1984)

Substitute the following for the introductory portion of paragraph (a) of the basic clause: When the response to this solicitation covers charges for special construction or special assembly that contain costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:

(End of Provision)

PROVISIONS POPULATED BASED ON REGISTRATION DATA

| | | |
|---------------------|---|-------------------|
| FAR 52.203-2 | Certificate of Independent Price Determination | (Apr 1985) |
|---------------------|---|-------------------|

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- (a) The offeror certifies that
- (1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
 - (2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and
 - (3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.
- (b) Each signature on the offer is considered to be a certification by the signatory that the signatory-
- (1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; or
 - (2)
 - (i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision **Pamela Tapscott, Vice President, Contract Administration; Lisa Schwartz, Sr. Vice President; Allison Barger, Sr. Vice President and Director of Financial Operations; Deborah Reed, Sr. Vice President; Margo L. Rosenbach, Vice President; Anu Rangarajan, Sr. Vice President; Jill Constantine, Sr. Vice President; Christopher Trenholm, Vice President; Sheena M. McConnell, Senior Fellow; Tim Lake, Senior Fellow; Andrew Weiss, Vice President; Jonathan Morse, Senior Vice President; Nancy Murray, Vice President; Matt Stagner, Vice President; Erin Taylor, Vice President; Akira Bell, Sr. Vice President; Susanne James-Burdumy, Vice President; Matthew Gillingham, Vice President; Paul Decker, President and CEO; Timothy Novak, Vice President; Adam Coyne, Sr. Vice President; Alison Logie, Vice President; Kate Miller, Vice President; Susan Budreau, Vice President, Deputy General Counsel;**
 - (ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) of this provision have not participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; and
 - (iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision.
- (c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

(End of Provision)

FAR 52.204-3

Taxpayer Identification

(Oct 1998)

(a) Definitions

"Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the

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offeror is a member.

"Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a Social Security Number or an Employer Identification Number.

(b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting contract is subject to the payment reporting requirements described in Federal Acquisition Regulation (FAR) 4.904, the failure or refusal by the offeror to furnish the information may result in a 31 percent reduction of payments otherwise due under the contract.

(c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN.

(d) Taxpayer Identification Number (TIN).

* ☒ TIN on file.

* ☐ TIN has been applied for.

* TIN is not required because:

* ☐ Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States;

* ☐ Offeror is an agency or instrumentality of a foreign government;

* ☐ Offeror is an agency or instrumentality of the Federal Government.

(e) Type of organization.

* ☐ sole proprietorship;

* ☐ Partnership;

* ☒ Corporate entity (not tax-exempt);

* ☐ Corporate entity (tax-exempt);

* ☐ Government entity (Federal, State, or local);

* ☐ Foreign government;

* ☐ International organization per 26 CFR 1.6049-4;

* ☐ Other **Subchapter S Corporation**

(f) Common parent.

* ☐ Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision. Name and TIN of common parent: Name: **Mathematica Group Holdings**

TIN: **TIN on File**

(End of Provision)

FAR 52.204-5

Women-Owned Business (Other Than Small Business)

(Oct 2014)

(a) Definition. "Women-owned business concern," as used in this provision, means a concern that is at least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51 percent of its stock is owned by one or more women; and whose management and daily business operations are controlled by one or more women.

(b) Representation. [Complete only if the offeror is a women-owned business concern and has not represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business Program Representations, of this solicitation.] The offeror represents that it ☐ is a women-owned business concern.

(End of Provision)

ED 002682

(a) Definition. As used in this provision--

Commercial and Government Entity (CAGE) code means--

(1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government entity by unique location; or

(2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or by the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

Highest-level owner means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

Immediate owner means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

(b) The Offeror represents that it ☒ **HAS** an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if applicable, paragraph (d) of this provision for each participant in the joint venture.*

(c) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:

Immediate owner CAGE code: **5D318**

Immediate owner legal name: **MATHEMATICA INC**

(Do not use a "doing business as" name)

Is the immediate owner owned or controlled by another entity? **NO**

(d) If the Offeror indicates "yes" in paragraph (c) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information:

Highest-level owner CAGE code: **(blank)**

Highest-level owner legal name: **(blank)**

(Do not use a "doing business as" name)

(End of Provision)

(a) Definitions. As used in this provision--

"Commercial and Government Entity (CAGE) code" means--

(1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government entity by unique location; or

(2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

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"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary, depending on State law and specific circumstances.

(b) The Offeror represents that it ☒ **IS NOT** a successor to a predecessor that held a Federal contract or grant within the last three years.

(c) If the Offeror has indicated "is" in paragraph (b) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years(if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: **(blank)**

(or mark "Unknown").

Predecessor legal name: **(blank)**

(Do not use a "doing business as" name)

(End of Provision)

| | | |
|----------------------|--|-------------------|
| FAR 52.204-26 | Covered Telecommunications Equipment or Services - Representation | (Oct 2020) |
|----------------------|--|-------------------|

(a) Definitions. As used in this provision, "covered telecommunications equipment or services" and "reasonable inquiry" have the meaning provided in the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) Procedures. The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (<https://www.sam.gov>) for entities excluded from receiving federal awards for "covered telecommunications equipment or services."

(c)

(1) Representation. The Offeror represents that it ☒ **DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.

(2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it , ☒ **DOES NOT** use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

(End of Provision)

| | | |
|---------------------|---|-------------------|
| FAR 52.209-2 | Prohibition on Contracting with Inverted Domestic Corporations- Representation | (Nov 2015) |
|---------------------|---|-------------------|

(a) Definitions. "Inverted domestic corporation" and "subsidiary" have the meaning given in the clause of this contract entitled Prohibition on Contracting with Inverted Domestic Corporations (52.209-10).

(b) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.

(c) Representation. the offeror represents that-

(1) It ☒ **IS NOT** an inverted domestic corporation; and

(2) It ☒ **IS NOT** a subsidiary of an inverted domestic corporation.

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(a)

(1) The Offeror certifies, to the best of its knowledge and belief, that-

(i) The Offeror and/or any of its Principals-

(A) **✖ ARE NOT** presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(B) **✖ HAVE NOT**, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) contract or subcontract; violation of Federal or State antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property (if offeror checks "have", the offeror shall also see 52.209-7, if included in this solicitation);

(C) **✖ ARE NOT** presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.

(D) **✖ HAVE NOT**, within a three-year period preceding this offer, been notified of any delinquent Federal Taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.

(1) Federal taxes are considered delinquent if both of the following criteria apply:

(i) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.

(ii) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(2) Examples:

(i) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.

(ii) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C. 6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to

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contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.

(iii) The taxpayer has entered into an installment agreement pursuant to I.R.C.6159. The taxpayer is making timely payments and is in full compliance with the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.

(iv) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under 11 U.S.C 362 (the Bankruptcy Code).

(ii) The Offeror, **HAS NOT**, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.

(2) "Principal," for the purposes of this certification, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a division or business segment; and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

(b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.

(d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

(End of Provision)

FAR 52.209-11

Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law

(Feb 2016)

(a) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-

(1) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government.

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(2) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the interests of the Government.

(b) The Offeror represents that-

(1) It **✖ IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and

(2) It **✖ IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

(End of Provision)

FAR 52.212-3

**Offeror Representations and Certifications - Commercial Products
and Commercial Services**

(Nov 2021)

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.212-3(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.212-3(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

The Offeror shall complete only paragraph (b) of this provision if the Offeror has completed the annual representations and certifications electronically in the System for Award Management (SAM) accessed through <https://www.sam.gov>. If the Offeror has not completed the annual representations and certifications electronically, the Offeror shall complete only paragraphs (c) through (v) of this provision.

(a) Definitions. As used in this provision-

"Covered telecommunications equipment or services" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Economically disadvantaged women-owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127. It automatically qualifies as a women-owned small business eligible under the WOSB Program.

"Forced or indentured child labor" means all work or service-

(1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or

(2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.

"Highest-level owner" means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

"Immediate owner" means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking

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management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

"Inverted domestic corporation", means a foreign incorporated entity that meets the definition of an inverted domestic corporation under 6 U.S.C. 395(b), applied in accordance with the rules and definitions of 6 U.S.C. 395(c).

"Manufactured end product" means any end product in product and service codes (PSCs) 1000-9999, except-

- (1) PSC 5510, Lumber and Related Basic Wood Materials;
- (2) Product or Service Group (PSG) 87, Agricultural Supplies;
- (3) PSG 88, Live Animals;
- (4) PSG 89, Subsistence;
- (5) PSC 9410, Crude Grades of Plant Materials;
- (6) PSC 9430, Miscellaneous Crude Animal Products, Inedible;
- (7) PSC 9440, Miscellaneous Crude Agricultural and Forestry Products;
- (8) PSC 9610, Ores;
- (9) PSC 9620, Minerals, Natural and Synthetic; and
- (10) PSC 9630, Additive Metal Materials.

"Place of manufacture" means the place where an end product is assembled out of components, or otherwise made or processed from raw materials into the finished product that is to be provided to the Government. If a product is disassembled and reassembled, the place of reassembly is not the place of manufacture.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Reasonable inquiry" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007 (Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

- (1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;
- (2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;
- (3) Consist of providing goods or services to marginalized populations of Sudan;
- (4) Consist of providing goods or services to an internationally recognized peacekeeping force or humanitarian organization;
- (5) Consist of providing goods or services that are used only to promote health or education; or
- (6) Have been voluntarily suspended.

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"Sensitive technology"

- (1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-
 - (i) To restrict the free flow of unbiased information in Iran; or
 - (ii) To disrupt, monitor, or otherwise restrict speech of the people of Iran; and
- (2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).

"Service - disabled veteran - owned small business concern"

- (1) Means a small business concern-
 - (i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans; and
 - (ii) The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.
- (2) Service-disabled veteran means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

- (1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria in 13 CFR part 121 and size standards in this solicitation.
- (2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern", consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that-

- (1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-
 - (i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States; and
 - (ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and
- (2) The management and daily business operations of which are controlled (as defined at 13.CFR 124.106) by individuals, who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Subsidiary" means an entity in which more than 50 percent of the entity is owned

- (1) Directly by a parent corporation; or
- (2) Through another subsidiary of a parent corporation.

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"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary, depending on State law and specific circumstances.

"Veteran owned small business concern" means a small business concern-

- (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127), means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States.

"Women-owned small business concern" means a small business concern-

- (1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

(b)

(1) Annual Representations and Certifications. Any changes provided by the Offeror in paragraph (b)(2) of this provision do not automatically change the representations and certifications in SAM.

(2) The Offeror has completed the annual representations and certifications electronically in SAM accessed through <https://www.sam.gov>. After reviewing SAM information, the Offeror verifies by submission of this offer that the representations and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications-Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), at the time this offer is submitted and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs _____.

[Offeror to identify the applicable paragraphs at (c) through (v) of this provision that the offeror has completed for the purposes of this solicitation only, if any.

These amended representation(s) and/or certification(s) are also incorporated in this offer and are current, accurate, and complete as of the date of this offer.

Any changes provided by the offeror are applicable to this solicitation only, and do not result in an update to the representations and certifications posted electronically on SAM.]

(c) Offerors must complete the following representations when the resulting contract is to be performed inside the United States or its outlying areas. Check all that apply.

| NAICS Code | Name | NAICS Exception | Size Standard | Small Business? |
|------------|--|-----------------|---------------|-----------------|
| 518210 | Data Processing, Hosting, and Related Services | | \$35,000,000 | N |
| 541511 | Custom Computer Programming Services | | \$30,000,000 | N |
| 541512 | Computer Systems Design Services | | \$30,000,000 | N |
| 541513 | Computer Facilities Management Services | | \$32,500,000 | N |
| 541519 | Other Computer Related Services | 1 | \$30,000,000 | N |

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| NAICS Code | Name | NAICS Exception | Size Standard | Small Business? |
|------------|--|-----------------|---------------|-----------------|
| 541519 | Information Technology Value Added Resellers | 2 | 150 | N |
| 541611 | Administrative Management and General Management Consulting Services | | \$21,500,000 | N |
| 541618 | Other Management Consulting Services | | \$16,500,000 | N |
| 541690 | Other Scientific and Technical Consulting Services | | \$16,500,000 | N |
| 541714 | Research and Development in Biotechnology (except Nanobiotechnology) | | 1000 | N |
| 541720 | Research and Development in the Social Sciences and Humanities | | \$24,500,000 | N |
| 541990 | All Other Professional, Scientific, and Technical Services | | \$17,000,000 | N |
| 611430 | Professional and Management Development Training | | \$13,000,000 | N |
| 611710 | Educational Support Services | | \$21,000,000 | N |
| 624110 | Child and Youth Services | | \$13,500,000 | N |

(1) *Small business concern. The offeror represents as part of its offer that it , ☒ **IS NOT** a small business concern.

(2) *Veteran-owned small business concern. The offeror represents as part of its offer that it , ☒ **IS NOT** a veteran-owned small business concern.

(3) *Service-disabled veteran-owned small business concern. The offeror represents as part of its offer that it , ☒ **IS NOT** a service-disabled veteran-owned small business concern.

(4) Small disadvantaged business concern. The offeror represents, that it ☐ is, ☐ is not a small disadvantaged business concern as defined in 13 CFR 124.1002.

(5) *Women-owned small business concern. The offeror represents that it , ☒ **IS NOT** a women-owned small business concern.

(6) **WOSB concern eligible under the WOSB Program. [Complete only if the offeror represented itself as a women-owned small business concern in paragraph (c)(5) of this provision] The offeror represents that:

(i) It ☐ is, ☐ is not a WOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and

(ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(6)(i) of this provision is accurate in reference to the WOSB concern or concerns that are participating in the joint venture.

[The offeror shall enter the name or names of the WOSB concern or concerns that are participating in the joint venture:] Each WOSB concern participating in the joint venture shall submit a separate signed copy of the WOSB representation.

(7) **Economically disadvantaged women-owned small business (EDWOSB) concern . [Complete only if the offeror represented itself as a WOSB concern eligible under the WOSB Program in (c)(6) of this provision.] The offeror represents that:

(i) It ☐ is, ☐ is not an EDWOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and

(ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, **ED 002691**



representation in paragraph (c)(7)(i) of this provision is accurate for each EDWOSB concern participating in the joint venture.

[The offeror shall enter the name or names of the EDWOSB concern and other small businesses that are participating in the joint venture: .] Each EDWOSB concern participating in the joint venture shall submit a separate signed copy of the EDWOSB representation.

Note: Complete paragraphs (c)(8) and (c)(9) only if this solicitation is expected to exceed the simplified acquisition threshold.

(8) Women-owned business concern (other than small business concern). [Complete only if the offeror is a women-owned business concern and did not represent itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents that it ☐ is a women-owned business concern.

(9) Tie bid priority for labor surplus area concerns. If this is an invitation for bid, small business offerors may identify the labor surplus areas in which costs to be incurred on account of manufacturing or production (by offeror or first-tier subcontractors) amount to more than 50 percent of the contract price:

State Eligible Labor Surplus: **(blank)** Civil Jurisdictions Included: **(blank)**

(10) HUBZone small business concern. The offeror represents as part of its offer, that-

(i) It ☒ **IS NOT** a HUBZone small business concern listed, on the date of this representation, on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration, and no material change in ownership and control, principal office, or HUBZone employee percentage has occurred since it was certified in accordance with 13 CFR part 126; and

(ii) It ☒ **IS NOT** a HUBZone joint venture that complies with the requirements of 13 CFR part 126, and the representation in paragraph (c)(11)(i) of this provision is accurate for each HUBZone small business concern participating in the HUBZone joint venture.

[The offeror shall enter the names of each of the HUBZone small business concerns participating in the HUBZone joint venture: .] Each HUBZone small business concern participating in the joint venture shall submit a separate signed copy of the HUBZone representation.

(d) Representations required to implement provisions of Executive Order 11246-

(1) Previous contracts and compliance. The offeror represents that-

(i) It ☒ **HAS** participated in a previous contract or subcontract subject to the Equal Opportunity clause of this solicitation; and

(ii) It ☒ **HAS** filed all required compliance reports.

(2) Affirmative Action Compliance. The offeror represents that-

(i) It ☒ **HAS DEVELOPED AND HAS ON FILE**, It at each establishment, affirmative action programs required by rules and regulations of the Secretary of Labor (41 cfr parts 60-1 and 60-2), or

(ii) It ☐ has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

(e) Certification Regarding Payments to Influence Federal Transactions (31 U.S.C. 1352). (Applies only if the contract is expected to exceed \$150,000.) By submission of its offer, the offeror certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress or an employee of a Member of Congress on his or her behalf in connection with the award of any resultant contract. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.

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(1)

(i) The Offeror certifies that each end product, except those listed in paragraph (f)(2) of this provision, is a domestic end product.

(ii) The Offeror shall list as foreign end products those end products manufactured in the United States that do not qualify as domestic end products.

(iii) The terms "domestic end product," "end product," "foreign end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Supplies."

(2) Foreign End Products: **(blank)**

(3) The Government will evaluate offers in accordance with the policies and procedures of FAR Part 25.

(g)

(1) Buy American-Free Trade Agreements-Israeli Trade Act Certificate. (Applies only if the clause at FAR 52.225-3, Buy American-Free Trade Agreements-Israeli Trade Act, is included in this solicitation.)

(i)

(A) The Offeror certifies that each end product, except those listed in paragraph (g)(1)(ii) or

(iii) of this provision, is a domestic end product.

(B) The terms "Bahrainian, Moroccan, Omani, Panamanian, or Peruvian end product," "domestic end product," "end product," "foreign end product," "Free Trade Agreement country," "Free Trade Agreement country end product," "Israeli end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act."

(iii) The offeror shall list those supplies that are foreign end products (other than those listed in paragraph (g)(1)(ii) of this provision) as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act." The offeror shall list as other foreign end products those end products manufactured in the United States that do not qualify as domestic end products.

Other Foreign End Products: **(blank)**

(iv) The Government will evaluate offers in accordance with the policies and procedures of FAR Part 25.

(2) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate I. If Alternate I to the clause at FAR 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:

(g)(1)(ii) The offeror certifies that the following supplies are Canadian end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Canadian End Products: **(blank)**

(3) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate II. If Alternate II to the clause at FAR 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:

(g)(1)(ii) The offeror certifies that the following supplies are Canadian end products or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Canadian or Israeli End Products: **(blank)**

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(4) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate I. If Alternate II to the clause at 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:

(g)(1)(ii) The offeror certifies that the following supplies are Free Trade Agreement country end products (other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian end products) or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Free Trade Agreement Country End Products (Other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian End Products) or Israeli End Products: **(blank)**

(5) Trade Agreements Certificate. (Applies only if the clause at FAR 52.225-5, Trade Agreements, is included in this solicitation.)

(i) The offeror certifies that each end product, except those listed in paragraph (g)(5)(ii) of this provision, is a U.S.-made or designated country end product, as defined in the clause of this solicitation entitled "Trade Agreements."

(ii) The offeror shall list as other end products those end products that are not U.S.-made or designated country end products.

Other End Products: **(blank)**

(iii) The Government will evaluate offers in accordance with the policies and procedures of FAR Part 25. For line items covered by the WTO GPA, the Government will evaluate offers of U.S.-made or designated country end products without regard to the restrictions of the Buy American statute. The Government will consider for award only offers of U.S.-made or designated country end products unless the Contracting Officer determines that there are no offers for such products or that the offers for such products are insufficient to fulfill the requirements of the solicitation.

(h) Certification Regarding Responsibility Matters (Executive Order 12689). (Applies only if the contract value is expected to exceed the simplified acquisition threshold.) The offeror certifies, to the best of its knowledge and belief, that the offeror and/or any of its principals-

(1) **✗ ARE NOT** presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(2) **✗ HAVE NOT**, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a Federal, state or local government contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property;

(3) **✗ ARE NOT** presently indicted for, or otherwise criminally or civilly charged by a Government entity with, commission of any of these offenses enumerated in paragraph (h)(2) of this clause; and

(4) **✗ HAVE NOT** within a three-year period preceding this offer, been notified of any delinquent Federal taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.

(i) Taxes are considered delinquent if both of the following criteria apply:

(A) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.

(B) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has

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failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(ii) Examples:

(A) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court Review, this will not be a final tax liability under the taxpayer has exercised all judicial appeal rights.

(B) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C.6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the tax payer has exercised all judicial appeal rights.

(C) The taxpayer has entered into an installment agreement pursuant to I.R.C.6159. The taxpayer is making timely payments and is in full compliance with the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.

(D) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under 11 U. S. C 362 (the Bankruptcy Code).

(i) Certification Regarding Knowledge of Child Labor for Listed End Products (Executive Order 13126). [The Contracting Officer must list in paragraph (i)(1) any end products being acquired under this solicitation that are included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, unless excluded at 22.1503(b).]

(1) Listed end products.

| Listed End Products | Listed Country of Origin |
|----------------------------|--|
| Bamboo | Burma |
| Beans (green, soy, yellow) | Burma |
| Brazil Nuts/Chestnuts | Bolivia |
| Bricks | Afghanistan, Burma, China, India, Nepal, Pakistan |
| Carpets | Nepal, Pakistan |
| Cattle | South Sudan |
| Cassiterite | Democratic Republic of Congo |
| Coal | Pakistan |
| Coca (stimulant plant) | Colombia |
| Cocoa | Cote d'Ivoire, Nigeria |
| Coffee | Cote d'Ivoire |
| Coltan | Democratic Republic of Congo |
| Cotton | Benin, Burkina Faso, China, Tajikistan, Uzbekistan |
| Cottonseed (hybrid) | India |
| Diamonds | Sierra Leone |
| Dried Fish | Bangladesh |
| Electronics | China |

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| Listed End Products | Listed Country of Origin |
|-----------------------------|--|
| Embroidered Textiles (zari) | India, Nepal |
| Fish | Ghana |
| Garments | Argentina, India, Thailand, Vietnam |
| Gold | Burkina Faso, Democratic Republic of Congo |
| Granite | Nigeria |
| Gravel (crushed stones) | Nigeria |
| Pornography | Russia |
| Rice | Burma, India, Mali |
| Rubber | Burma |
| Shrimp | Thailand |
| Stones | India, Nepal |
| Sugarcane | Bolivia, Burma |
| Teak | Burma |
| Textiles (hand-woven) | Ethopia |
| Tilapia (fish) | Ghana |
| Tobacco | Malawi |
| Toys | China |
| Wolframite | Democratic Republic of Congo |

(2) Certification. [If the Contracting Officer has identified end products and countries of origin in paragraph (i)(1) of this provision, then the offeror must certify to either (i)(2)(i) or (i)(2)(ii) by checking the appropriate block.]

(i) ☒ The offeror will not supply any end product listed in paragraph (i)(1) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product.

(ii) ☐ The offeror may supply an end product listed in paragraph (i)(1) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product. The offeror certifies that it has made a good faith effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture any such end product furnished under this contract. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

(j) Place of Manufacture (Does not apply unless the solicitation is predominantly for the acquisition of manufactured end products.) For statistical purposes only, the offeror shall indicate whether the place of manufacture of the end products it expects to provide in response to this solicitation is predominantly-

(1) In the United States (Check this box if the total anticipated price of offered end products manufactured in the United States exceeds the total anticipated price of offered end products manufactured outside the United States); or

(2) Outside the United States.

| FSC Code | Place Of Manufacture |
|----------|----------------------|
|----------|----------------------|

(k) Certificates regarding exemptions from the application of the Service Contract Labor Standards (Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services.) [The contracting officer is to check a box to indicate if paragraph (k)(1) or (k)(2) applies.]

(1) Maintenance, calibration, or repair of certain equipment as described in FAR 22.1003-4(c)(1). The offeror

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(i) The items of equipment to be serviced under this contract are used regularly for other than Governmental purposes and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontract) in substantial quantities to the general public in the course of normal business operations;

(ii) The services will be furnished at prices which are, or are based on, established catalog or market prices (see FAR 22.1003-4(c)(2)(ii)) for the maintenance, calibration, or repair of such equipment; and

(iii) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract will be the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.

(2) Certain services as described in FAR 22.1003-4(d)(1). The offeror, **✖ DOES NOT** certify that ____

(i) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;

(ii) The contract services will be furnished at prices that are, or are based on, established catalog or market prices (see FAR 22.1003-4(d)(2)(iii));

(iii) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and

(iv) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract is the same as that used for these employees and equivalent employees servicing commercial customers.

(3) If paragraph (k)(1) or (k)(2) of this clause applies ____

(i) If the offeror does not certify to the conditions in paragraph (k)(1) or (k)(2) and the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation, the offeror shall notify the Contracting Officer as soon as possible; and

(ii) The Contracting Officer may not make an award to the offeror if the offeror fails to execute the certification in paragraph (k)(1) or (k)(2) of this clause or to contact the Contracting Officer as required in paragraph (k)(3)(i) of this clause.

(l) Taxpayer Identification Number (TIN) (26 U.S.C. 6109, 31 U.S.C. 7701). (Not applicable if the offeror is required to provide this information to SAM to be eligible for award.)

(1) All offerors must submit the information required in paragraphs (l)(3) through (l)(5) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the Internal Revenue Service (IRS).

(2) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN.

(3) Taxpayer Identification Number (TIN).

* ☒ TIN on file.

* ☐ TIN has been applied for.

*TIN is not required because:

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- * ☐ Offeror is a non-resident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States;
- * ☐ Offeror is an agency or instrumentality of a foreign government;
- * ☐ Offeror is an agency or instrumentality of the Federal Government.

(4) Type of organization.

- * ☐ sole proprietorship;
- * ☐ Partnership;
- * ☒ Corporate entity (not tax-exempt);
- * ☐ Corporate entity (tax-exempt);
- * ☐ Government entity (Federal, State, or local);
- * ☐ Foreign government;
- * ☐ International organization per 26 CFR 1.6049-4;
- * ☐ Other **Subchapter S Corporation**

(5) Common parent.

- * ☐ Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision.
- * ☒ Name: **Mathematica Group Holdings**

TIN: **TIN on File**

(m) Restricted business operations in Sudan. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.

(n) Prohibition on Contracting with Inverted Domestic Corporations.

(1) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.

(2) Representation. the offeror represents that-

- (i) It ☒ **IS NOT** an inverted domestic corporation; and
- (ii) It ☒ **IS NOT** a subsidiary of an inverted domestic corporation.

(o) Prohibition on contracting with entities engaging in certain activities or transactions relating to Iran.

(1) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.

(2) Representation and Certifications. Unless a waiver is granted or an exception applies as provided in paragraph (o)(3) of this provision, by submission of its offer, the offeror-

- (i) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran;
- (ii) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act; and
- (iii) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at

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(3) The representation and certification requirements of paragraph (o)(2) of this provision do not apply if-

- (i) This solicitation includes a trade agreements certification (e.g., 52.212-3(g) or a comparable agency provision); and
- (ii) The offeror has certified that all the offered products to be supplied are designated country end products.

(p) Ownership or Control of Offeror. (Applies in all solicitations when there is a requirement to be registered in SAM or a requirement to have a unique entity identifier in the solicitation.)

(1) The Offeror represents that it ☒ **HAS** an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if applicable, paragraph (d) of this provision for each participant in the joint venture.*

(2) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:

Immediate owner CAGE code: **5D318**

Immediate owner legal name: **MATHEMATICA INC**

(Do not use a "doing business as" name)

Is the immediate owner owned or controlled by another entity? **NO**

(3) If the Offeror indicates "yes" in paragraph (p)(2) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information:

Highest-level owner CAGE code: ____

Highest-level owner legal name: **(blank)**

(Do not use a "doing business as" name)

(q) Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law.

(1) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L.113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-

(i) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or

(ii) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the interests of the Government.

(2) The Offeror represents that-

(i) It ☒ **IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and

(ii) It ☒ **IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

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(1) The Offeror represents that it **IS NOT** a successor to a predecessor that held a Federal contract or grant within the last three years.

(2) If the Offeror has indicated "is" in paragraph (r)(1) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years(if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: **(blank)**

(or mark "Unknown").

Predecessor legal name: **(blank)**

(Do not use a "doing business as" name)

(s) Reserved.

(t) Public Disclosure of Greenhouse Gas Emissions and Reduction Goals. Applies in all solicitations that require offerors to register in SAM (12.301(d)(1)).

(1) This representation shall be completed if the Offeror received \$7.5 million or more in contract awards in the prior Federal fiscal year. The representation is optional if the Offeror received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.

(2) Representation. [Offeror to check applicable block(s) in paragraph (t)(2)(i) and (ii)].

(i) The Offeror (itself or through its immediate owner or highest-level owner) ☐ does ☐ does not publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.

(ii) The Offeror (itself or through its immediate owner or highest-level owner) ☐ does ☐ does not publicly disclose a quantitative greenhouse gas emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.

(iii) A publicly accessible Web site includes the Offeror's own Web site or a recognized, third-party greenhouse gas emissions reporting program.

(3) If the Offeror checked "does" in paragraphs (t)(2)(i) or (t)(2)(ii) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported:

(blank)

(u)

(1) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.

(2) The prohibition in paragraph (u)(1) of this provision does not contravene requirements applicable to Standard Form 312 (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartment

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Information and NonDisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.

(3) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).

(v) Covered Telecommunications Equipment or Services - Representation. Section 889(a)(1) and Section 889(a)(1)(B) of Public Law 115-232.

(1) The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (<https://www.sam.gov>) for entities excluded from receiving federal awards for "covered telecommunications equipment or services".

(2) The Offeror represents that-

(i) It **✗ DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.

(ii) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it, **✗ DOES NOT** use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

Alternate I (Oct 2014)

As prescribed in 12.301(b)(2), add the following paragraph (c)(11) to the basic provision:

(11) (Complete if the offeror has represented itself as disadvantaged in paragraph (c)(4) of this provision.)

☐ Black American.

☐ Hispanic American.

☐ Native American (American Indians, Eskimos, Aleuts, or Native Hawaiians).

☐ Asian-Pacific American (persons with origins from Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Japan, China, Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, The Philippines, Republic of Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu, or Nauru).

☐ Subcontinent Asian (Asian-Indian) American (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands, or Nepal).

☐ Individual/concern, other than one of the preceding.

(End of Provision)

FAR 52.214-14

Place of Performance-Sealed Bidding

(Apr 1985)

(a) The bidder, in the performance of any contract resulting from this solicitation, **☑ INTENDS**, [check applicable box] to use one or more plants or facilities located at a different address from the address of the bidder as indicated in this bid.

(b) If the bidder checks "intends" in paragraph (a) of this provision, it shall insert in the spaces provided below the required information:

Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

| Owner | Place of Performance Address | Owner Address |
|-----------------------------------|------------------------------|---|
| Mathematica Policy Research, Inc. | 220 East Huron Street | 220 East Huron Street ED 062701 |



| Owner | Place of Performance Address | Owner Address |
|-----------------------------------|--|--|
| | Suite 300 Ann Arbor, MI 48104, UNITED STATES | Suite 300 Ann Arbor, MI 48104, UNITED STATES |
| Mathematica Policy Research, Inc. | 955 Massachusetts Avenue Suite 801 Cambridge, MA 02139, UNITED STATES | 955 Massachusetts Avenue Suite 801 Cambridge, MA 02139, UNITED STATES |
| Mathematica Policy Research, Inc. | 111 East Wacker Drive Suite 920 Chicago, IL 60601, UNITED STATES | 111 East Wacker Drive Suite 920 Chicago, IL 60601, UNITED STATES |
| Mathematica Policy Research, Inc. | 505 14th Street Suite 800 Oakland, CA 94612, UNITED STATES | 505 14th Street Suite 800 Oakland, CA 94612, UNITED STATES |
| Mathematica Policy Research, Inc. | 1100 1st Street, NE 12th Floor Washington, DC 20002, UNITED STATES | 1100 1st Street, NE 12th Floor Washington, DC 20002, UNITED STATES |
| Mathematica Policy Research, Inc. | 7102 Ambassador Road Woodlawn, MD 21244, UNITED STATES | 7102 Ambassador Road Woodlawn, MD 21244, UNITED STATES |
| Mathematica Policy Research, Inc. | 6991 E. Southpoint Road Bldg. 2 Tucson, AZ 85756, UNITED STATES | 6991 E. Southpoint Road Bldg. 2 Tucson, AZ 85756, UNITED STATES |
| Mathematica Policy Research, Inc. | 2101 4th Avenue, Suite 1350 Seattle, WA 98121, UNITED STATES | 2101 4th Avenue, Suite 1350 Seattle, WA 98121, UNITED STATES |

(End of Provision)

| FAR 52.215-6 | Place of Performance | (Oct 1997) |
|--------------|----------------------|------------|
|--------------|----------------------|------------|

(a) The offeror or respondent, in the performance of any contract resulting from this solicitation, ☒ **INTENDS** [check applicable block] to use one or more plants or facilities located at a different address from the address of the offeror or respondent as indicated in this proposal or response to request for information.

(b) If the offeror or respondent checks "intends" in paragraph (a) of this provision, it shall insert in the following spaces the required information:

Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

| Owner | Place of Performance Address | Owner Address |
|-----------------------------------|---|---|
| Mathematica Policy Research, Inc. | 220 East Huron Street Suite 300 Ann Arbor, MI 48104, UNITED STATES | 220 East Huron Street Suite 300 Ann Arbor, MI 48104, UNITED STATES |
| Mathematica Policy Research, Inc. | 955 Massachusetts Avenue Suite 801 | 955 Massachusetts Avenue Suite 801 |

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| Owner | Place of Performance Address | Owner Address |
|-----------------------------------|---|---|
| | Cambridge, MA 02139, UNITED STATES | Cambridge, MA 02139, UNITED STATES |
| Mathematica Policy Research, Inc. | 111 East Wacker Drive Suite 920 Chicago, IL 60601, UNITED STATES | 111 East Wacker Drive Suite 920 Chicago, IL 60601, UNITED STATES |
| Mathematica Policy Research, Inc. | 505 14th Street Suite 800 Oakland, CA 94612, UNITED STATES | 505 14th Street Suite 800 Oakland, CA 94612, UNITED STATES |
| Mathematica Policy Research, Inc. | 1100 1st Street, NE 12th Floor Washington, DC 20002, UNITED STATES | 1100 1st Street, NE 12th Floor Washington, DC 20002, UNITED STATES |
| Mathematica Policy Research, Inc. | 7102 Ambassador Road Woodlawn, MD 21244, UNITED STATES | 7102 Ambassador Road Woodlawn, MD 21244, UNITED STATES |
| Mathematica Policy Research, Inc. | 6991 E. Southpoint Road Bldg. 2 Tucson, AZ 85756, UNITED STATES | 6991 E. Southpoint Road Bldg. 2 Tucson, AZ 85756, UNITED STATES |
| Mathematica Policy Research, Inc. | 2101 4th Avenue, Suite 1350 Seattle, WA 98121, UNITED STATES | 2101 4th Avenue, Suite 1350 Seattle, WA 98121, UNITED STATES |

(End of Provision)

FAR 52.219-1

Small Business Program Representations

(Nov 2020)

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.219-1(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.219-1(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

(a) Definitions. As used in this provision-

"Economically disadvantaged women-owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127. It automatically qualifies as a women-owned small business concern eligible under the WOSB Program.

"Service-disabled veteran-owned small business concern"

(1) Means a small business concern-

(i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans; and

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(i) The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.

(2) "Service-disabled veteran" means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

(1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria in 13 CFR part 121 and size standards in this solicitation.

(2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern," consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that

(1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-

(i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States, and

(ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and

(2) The management and daily business operations of which are controlled (as defined at 13 CFR 124.106) by individuals who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Veteran-owned small business concern" means a small business concern-

(1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and

(2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business concern" means a small business concern-

(1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and

(2) Whose management and daily business operations are controlled by one or more women.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127), means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States.

(b)

(1) The North American Industry Classification System (NAICS) code for this acquisition is See Note.*

(2) The small business size standard is See Note.

(3) The small business size standard for a concern which submits an offer in its own name, other than on a

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(c) Representations

| NAICS Code | Name | NAICS Exception | Size Standard | Small Business? |
|------------|--|-----------------|---------------|-----------------|
| 518210 | Data Processing, Hosting, and Related Services | | \$35,000,000 | N |
| 541511 | Custom Computer Programming Services | | \$30,000,000 | N |
| 541512 | Computer Systems Design Services | | \$30,000,000 | N |
| 541513 | Computer Facilities Management Services | | \$32,500,000 | N |
| 541519 | Other Computer Related Services | 1 | \$30,000,000 | N |
| 541519 | Information Technology Value Added Resellers | 2 | 150 | N |
| 541611 | Administrative Management and General Management Consulting Services | | \$21,500,000 | N |
| 541618 | Other Management Consulting Services | | \$16,500,000 | N |
| 541690 | Other Scientific and Technical Consulting Services | | \$16,500,000 | N |
| 541714 | Research and Development in Biotechnology (except Nanobiotechnology) | | 1000 | N |
| 541720 | Research and Development in the Social Sciences and Humanities | | \$24,500,000 | N |
| 541990 | All Other Professional, Scientific, and Technical Services | | \$17,000,000 | N |
| 611430 | Professional and Management Development Training | | \$13,000,000 | N |
| 611710 | Educational Support Services | | \$21,000,000 | N |
| 624110 | Child and Youth Services | | \$13,500,000 | N |

(1) ** The offeror represents as part of its offer that it, ☒ **IS NOT** a small business concern (see below).

(2) ** [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, that it ☐ is, ☐ is not, a small disadvantaged business concern as defined in 13 CFR 124.1002.

(3) ** [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a women-owned small business concern. (See Below)

(4) ** Women-owned small business (WOSB) concern eligible under the WOSB Program. [Complete only if the offeror represented itself as a women-owned small business concern in paragraph (c)(3) of this provision.]
The offeror represents as part of its offer that-

(i) It ☐ is, ☐ is not a WOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and

(ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(4)(i) of this provision is accurate for each WOSB concern eligible under the WOSB Program participating in the joint venture. [The offeror shall enter the name or names of the WOSB concern eligible under the WOSB Program and other small businesses that are participating in the joint venture: .] Each WOSB concern participating in the joint venture shall submit a separate signed copy of the WOSB representation.

(5) ** Economically disadvantaged women-owned small business (EDWOSB) concern. [Complete only if the

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offeror represented itself as a women-owned small business concern eligible under the WOSB Program in (c)(4) of this provision.] The offeror represents as part of its offer that-

(i) It ☐ is, ☐ is not an EDWOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and

(ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(5)(i) of this provision is accurate for each EDWOSB concern participating in the joint venture. [The offeror shall enter the name or names of the EDWOSB concern and other small businesses that are participating in the joint venture: .] Each EDWOSB concern participating in the joint venture shall submit a separate signed copy of the EDWOSB representation.

(6) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a veteran-owned small business concern.

(7) **[Complete only if the offeror represented itself as a veteran-owned small business concern in paragraph (c)(6) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a service-disabled veteran-owned small business concern. (See Below)

*If you are responding to a Government solicitation for supplies or services under a NAICS code not listed in paragraph (b) of this certification, you must provide this certification directly to the Contracting Officer.

**Small business concern, Veteran-owned small business concern, Service-disabled veteran-owned small business concern, and Women-owned small business concern size status is calculated based on the Small Business Administration size standard for each NAICS code using the size metrics (e.g. Average Number of Employees and Average Annual Receipts) provided by Mathematica Inc. in their SAM registration.

(8) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, as part of its offer, that-

(i) It ☐ is, ☐ is not a HUBZone small business concern listed, on the date of this representation, on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration, and no material changes in ownership and control, principal office, or HUBZone employee percentage have occurred since it was certified in accordance with 13 CFR Part 126; and

(ii) It ☐ is, ☐ is not a HUBZone joint venture that complies with the requirements of 13 CFR Part 126, and the representation in paragraph (c)(8)(i) of this provision is accurate for each HUBZone small business concern participating in the HUBZone joint venture. [The offeror shall enter the names of each of the HUBZone small business concerns participating in the HUBZone joint venture:] Each HUBZone small business concern participating in the joint venture shall submit a separate signed copy of the HUBZone representation.

(d) Notice.

(1) If this solicitation is for supplies and has been set aside, in whole or in part, for small business concerns, then the clause in this solicitation providing notice of the set-aside contains restrictions on the source of the end items to be furnished.

(2) Under 15 U.S.C. 645(d), any person who misrepresents a firm's status as a business concern that is small, HUBZone small, small disadvantaged, service-disabled veteran-owned small, economically disadvantaged woman-owned small, or women-owned small eligible under the WOSB Program in order to obtain a contract to be awarded under the preference programs established pursuant to section 8, 9, or 15, 31, and 36 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a

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- (i) Be punished by imposition of fine, imprisonment, or both;
- (ii) Be subject to administrative remedies, including suspension and debarment; and
- (iii) Be ineligible for participation in programs conducted under the authority of the Act.

Alternate I (Sept 2015)

As prescribed in 19.309(a)(2), add the following paragraph (c)(9) to the basic provision:

(9) [Complete if offeror represented itself as disadvantaged in paragraph (c)(2) of this provision.] The offeror shall check the category in which its ownership falls:

- ☐ Black American.
- ☐ Hispanic American.
- ☐ Native American (American Indians, Eskimos, Aleuts, or Native Hawaiians).
- ☐ Asian-Pacific American (persons with origins from Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Japan, China, Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, The Philippines, Republic of Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu, or Nauru).
- ☐ Subcontinent Asian (Asian-Indian) American (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands, or Nepal).
- ☐ Individual/concern, other than one of the preceding.

(End of Provision)

FAR 52.219-2

Equal Low Bids

(Oct 1995)

- (a) This provision applies to small business concerns only
- (b) The bidder's status as a labor surplus area (LSA) concern may affect entitlement to award in case of tie bids. If the bidder wishes to be considered for this priority, the bidder must identify, in the following space, the LSA in which the costs to be incurred on account of manufacturing or production (by the bidder or the first-tier subcontractors) amount to more than 50 percent of the contract price.
- (c) Failure to identify the labor surplus areas as specified in paragraph (b) of this provision will preclude the bidder from receiving priority consideration. If the bidder is awarded a contract as a result of receiving priority consideration under this provision and would not have otherwise received award, the bidder shall perform the contract or cause the contract to be performed in accordance with the obligations of an LSA concern.

(End of Provision)

FAR 52.222-18

Certification Regarding Knowledge of Child Labor for Listed End Products

(Feb 2021)

(a) Definition:

"Forced or indentured child labor" means all work or service-

- (1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or
- (2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.

(b) Listed end products. The following end product(s) being acquired under this solicitation is (are) included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, identified by their

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country of origin. There is a reasonable basis to believe that listed end products from the listed countries of origin may have been mined, produced, or manufactured by forced or indentured child labor.

| Listed End Products | Listed Country of Origin |
|-----------------------------|--|
| Bamboo | Burma |
| Beans (green, soy, yellow) | Burma |
| Brazil Nuts/Chestnuts | Bolivia |
| Bricks | Afghanistan, Burma, China, India, Nepal, Pakistan |
| Carpets | Nepal, Pakistan |
| Cattle | South Sudan |
| Cassiterite | Democratic Republic of Congo |
| Coal | Pakistan |
| Coca (stimulant plant) | Colombia |
| Cocoa | Cote d'Ivoire, Nigeria |
| Coffee | Cote d'Ivoire |
| Coltan | Democratic Republic of Congo |
| Cotton | Benin, Burkina Faso, China, Tajikistan, Uzbekistan |
| Cottonseed (hybrid) | India |
| Diamonds | Sierra Leone |
| Dried Fish | Bangladesh |
| Electronics | China |
| Embroidered Textiles (zari) | India, Nepal |
| Fish | Ghana |
| Garments | Argentina, India, Thailand, Vietnam |
| Gold | Burkina Faso, Democratic Republic of Congo |
| Granite | Nigeria |
| Gravel (crushed stones) | Nigeria |
| Pornography | Russia |
| Rice | Burma, India, Mali |
| Rubber | Burma |
| Shrimp | Thailand |
| Stones | India, Nepal |
| Sugarcane | Bolivia, Burma |
| Teak | Burma |
| Textiles (hand-woven) | Ethiopia |
| Tilapia (fish) | Ghana |
| Tobacco | Malawi |
| Toys | China |
| Wolframite | Democratic Republic of Congo |

(c) Certification. The Government will not make award to an offeror unless the offeror, by checking the appropriate block, certifies to either paragraph (c)(1) or paragraph (c)(2) of this provision

- (1) ☒ The offeror will not supply any end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in a corresponding country as listed for that end product.

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(2) The offeror may supply an end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product. The offeror certifies that it has made a good faith effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture such end product. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

(End of Provision)

FAR 52.222-22

Previous Contracts and Compliance Reports

(Feb 1999)

The offeror represents that-

- (a) It ☒ **HAS** participated in a previous contract or subcontract subject the Equal Opportunity clause of this solicitation;
- (b) It ☒ **HAS** filed all required compliance reports; and
- (c) Representations indicating submission of required compliance reports, signed by proposed subcontractors, will be obtained before subcontract awards.

(End of Provision)

FAR 52.222-25

Affirmative Action Compliance

(Apr 1984)

The offeror represents that-

- (a) It ☒ **HAS DEVELOPED AND HAS ON FILE**, at each establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor (41 CFR 60-1 and 60-2); or
- (b) It ☐ has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

(End of Provision)

FAR 52.222-48

Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Certification

(May 2014)

- (a) The offeror shall check the following certification:

Certification

The offeror ☒ **DOES NOT CERTIFY** that -

- (1) The items of equipment to be serviced under this contract are used regularly for other than Government purposes, and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontractor) in substantial quantities to the general public in the course of normal business operations;
- (2) The services will be furnished at prices which are, or are based on, established catalog or market prices for the maintenance, calibration, or repair of equipment.
 - (i) An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public.
 - (ii) An "established market price" is a current price, established in the usual course of trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror; and

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(3) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract are the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.

(b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(c)(3) that the Service Contract Labor Standards statute-

(1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or

(2) Will apply to this offeror, then the clause at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, in this solicitation will not be included in any resultant contract awarded to this offeror, and the offeror may be provided an opportunity to submit a new offer on that basis.

(c) If the offeror does not certify to the conditions in paragraph (a) of this provision-

(1) The clause in this solicitation at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, will not be included in any resultant contract awarded to this offeror; and

(2) The offeror shall notify the Contracting Officer as soon as possible, if the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation.

(d) The Contracting Officer may not make an award to the offeror, if the offeror fails to execute the certification in paragraph (a) of this provision or to contact the Contracting Officer as required in paragraph (c) of this provision.

(End of Provision)

| | | |
|----------------------|---|-------------------|
| FAR 52.222-52 | Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Certification | (May 2014) |
|----------------------|---|-------------------|

(a) The offeror shall check the following certification:

Certification

The offeror ☒ **DOES NOT** certify that -

(1) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;

(2) The contract services are furnished at prices that are, or are based on, established catalog or market prices. An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public. An "established market price" is a current price, established in the usual course of ordinary and usual trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror;

(3) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and

(4) The offeror uses the same compensation (wage and fringe benefits) plan for all service employees performing work under the contract as the offeror uses for these employees and for equivalent employees

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(b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(d)(3) that the Service Contract Labor Standards statute-

(1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or

(2) Will apply to this offeror, then the clause at FAR 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, in this solicitation will not be included in any resultant contract awarded to this offer, and the offeror may be provided an opportunity to submit a new offer on that basis.

(c) If the offeror does not certify to the conditions in paragraph (a) of this provision-

(1) The clause of this solicitation at 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, will not be included in any resultant contract to this offeror; and

(2) The offeror shall notify the Contracting Officer as soon as possible if the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation.

(d) The Contracting Officer may not make an award to the offeror, if the offeror fails to execute the certification in paragraph (a) of this provision or to contact the Contracting Officer as required in paragraph (c) of this provision.

(End of Provision)

FAR 52.223-4

Recovered Material Certification

(May 2008)

Mathematica Inc. has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.223-9

Estimate of Percentage of Recovered Material Content for EPA-Designated Items (Alternate I)

(May 2008)

Mathematica Inc. has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.223-22

Public Disclosure of Greenhouse Gas Emissions and Reduction Goals-Representation

(Dec 2016)

As prescribed in 23.804(b), insert the following provision:

Public Disclosure of Greenhouse Gas Emissions and Reduction Goals- Representation (Dec 2016)

(a) This representation shall be completed if the Offeror received \$7.5 million or more in Federal contract awards in the prior Federal fiscal year. The representation is optional if the Offeror received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.

(b) Representation [Offeror is to check applicable blocks in paragraphs (b)(1) and (2).]

(1) The Offeror (itself or through its immediate owner or highest-level owner) ☐ does, ☐ does not publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a

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greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.

(2) The Offeror (itself or through its immediate owner or highest-level owner) ☐ does, ☐ does not publicly disclose a quantitative greenhouse emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.

(3) A publicly accessible Web site includes the Offeror's own Web site or a recognized, third-party greenhouse gas emissions reporting program.

(c) If the Offeror checked "does" in paragraphs (b)(1) or (b)(2) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported: **(blank)**

(End of Provision)

| | | |
|---------------------|---------------------------------|-------------------|
| FAR 52.225-2 | Buy American Certificate | (Feb 2021) |
|---------------------|---------------------------------|-------------------|

(a)

(1) The Offeror certifies that each end product, except those listed in paragraph (b) of this provision, is a domestic end product.

(2) The Offeror shall list as foreign end products those end products manufactured in the United States that do not qualify as domestic end products.

(3) The terms "domestic end product," "end product," and "foreign end product," are defined in the clause of this solicitation entitled "Buy American-Supplies."

(b) Foreign End Products: **(blank)**

(c) The Government will evaluate offers in accordance with the policies and procedures of Part 25 of the Federal Acquisition Regulation.

(End of Provision)

| | | |
|---------------------|---|-------------------|
| FAR 52.225-4 | Buy American-Free Trade Agreements-Israeli Trade Act Certificate | (Feb 2021) |
|---------------------|---|-------------------|

(a)

(1) The Offeror certifies that each end product, except those listed in paragraph (b) or (c) of this provision, is a domestic end product.

(2) The terms "Bahrainian, Moroccan, Omani, Panamanian, or Peruvian end product," "domestic end product," "end product," "foreign end product," "Free Trade Agreement country," "Free Trade Agreement country end product," "Israeli end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act."

(b) The offeror certifies that the following supplies are Free Trade Agreement country end products (other than Bahrainian, Moroccan, Omani, Panamanian, or Peruvian end products) or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Free Trade Agreement Country End Products (Other than Bahrainian, Moroccan, Omani, Panamanian, or Peruvian End Products) or Israeli End Products: **(blank)**

(c) The offeror shall list those supplies that are foreign endproducts (other than those listed in paragraph (b) of this provision) as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act." The offeror shall list as other foreign end products those end products manufactured in the United States that do not qualify as domestic end products.

Other Foreign End Products: **(blank)**

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Alternate I (Jan 2021)

As prescribed in 25.1101 (b)(2)(ii), substitute the following paragraph (b) for paragraph (b) of the basic provision:

The offeror certifies that the following supplies are Canadian end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Canadian End Products: **(blank)**

Alternate II (Feb 2021)

As prescribed in 25.1101(b)(2)(iii), substitute the following paragraph (b) for paragraph (b) of the basic provision:

The offeror certifies that the following supplies are Canadian end products or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Canadian or Israeli End Products: **(blank)**

Alternate III (Feb 2021)

As prescribed in 25.1101(b)(2)(iv), substitute the following paragraph (b) for paragraph (b) of the basic provision:

The offeror certifies that the following supplies are Free Trade Agreement country end products (other than Bahrainian,Korean, Moroccan, Omani, Panamanian, or Peruvian end products) or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Free Trade Agreement Country End Products (Other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian End Products) or Israeli End Products: **(blank)**

(End of Provision)

| | | |
|---------------------|-------------------------------------|-------------------|
| FAR 52.225-6 | Trade Agreements Certificate | (Feb 2021) |
|---------------------|-------------------------------------|-------------------|

(a) The offeror certifies that each end product, except those listed in paragraph (b) of this provision, is a U.S.-made,or designated country, end product, as defined in the clause of this solicitation entitled "Trade Agreements."

(b) The offeror shall list as other end products those supplies that are not U.S.-made, or designated country, end products. Other End Products: **(blank)**

(c) The Government will evaluate offers in accordance with the policies and procedures of Part 25 of the Federal Acquisition Regulation. For line items covered by the WTO GPA,the Government will evaluate offers of U.S.-made, or designated country, end products without regard to the restrictions of the Buy American statute. The Government will consider for award only offers of U.S.-made, or designated country, end products unless the Contracting Officer determines that there are no offers for those products or that the offers for those products are insufficient to fulfill the requirements of this solicitation.

(End of Provision)

| | | |
|---------------------|---|-------------------|
| FAR 52.226-2 | Historically Black College or University and Minority Institution Representation | (Oct 2014) |
|---------------------|---|-------------------|

(a) Definitions. As used in this provision-

"Historically black college or university" means an institution determined by the Secretary of Education to meet the requirements of 34 CFR 608.2.

"Minority institution" means an institution of higher education meeting the requirements of Section 365(3) of the Higher Education Act of 1965 (20 U.S.C. 1067k), including a Hispanic-serving institution of higher education, as defined in Section 502(a) of the Act (20 U.S.C. 1101a).

ED 002713



- ⊗ **IS NOT** a historically black college or university;
- ⊗ **IS NOT** a minority institution.

(End of Provision)

| | | |
|---------------|--|------------|
| FAR 52.227-15 | Representation of Limited Rights Data and Restricted Computer Software | (Dec 2007) |
|---------------|--|------------|

Mathematica Inc. has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)



UNITED STATES DEPARTMENT OF EDUCATION

OFFICE OF FINANCE AND OPERATIONS

OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

Determination and Findings to add Funding for Contract 91990022C0013 - REL Central P00005

| | |
|--------------------------------------|--|
| Contract Number: | 91990022C0015 - REL Central |
| Period of Performance: | January 3, 2022, through January 2, 2027 |
| Acquisition Plan Tracking Number: | 751 |
| Purchase Request Number: | EDOIES-23-000275 |
| Purchase Amount: | \$694,000.00 |
| NAICS Code: | 611710: Educational Support Services |
| Contractor: | Mathematica |
| UEI | T41EGEAK2L35 |
| Product and Service Code (PSC): | R499: Support Professional: Other |
| Service Contract Coding Declaration: | Other Function |

AUTHORITY

Modification P00005 is executed in accordance with the following contract clauses:
Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

BACKGROUND

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

DESCRIPTION OF MODIFICATION

The Institution of Education Sciences has authorized the 7.5 million of program funds to be made available to the 10 RELs to increase the total contract values on the 10 REL contracts for the 2022-2027 cycle. This modification for REL Midwest will use this additional funding for the following:

- New project: Subtask 5.1 Understanding Individual Plans of Study Implementation and Outcomes in Kansas (5.1.8)
- Rescoped project: Subtask 4.1 Integrating Lakota/Dakota culture into elementary math instruction on the Standing Rock Reservation (4.1.2)
- Rescoped project: Subtask 4.1 Learning from the design and implementation of the South Dakota teacher apprenticeship pilot (4.1.9)

PURPOSE/ DESCRIPTION OF CHANGES

The purpose of this modification is the following:

- The Institution of Education Sciences has authorized 7.5 million of program funds to be made available to the 10 RELs to increase the total contract values on the 10 REL contracts for the 2022-2027 cycle. IES is statutorily obligated to allocate these additional program funds using the same funding formula that was used to determine the current total contract values for each REL region. As a result, REL Central will receive \$694,000 in additional contract value. In response to this contract value increase, REL Central's proposal documents dated July 17, 2023 are hereby incorporated into the contract.
- Incorporate a revised deliverable schedule
- In accordance with 3452.237-70 SERVICES OF CONSULTANTS, paragraph (b)(1), the daily rate set forth in this contract will be \$1,100.00. This rate supersedes the previous daily rate of \$800.00.
- Change ACOR from Elizabeth Nolan to Heidi Gansen
- In accordance with FAC 2023-04 published June 2, 2023, this modification adds FAR 52.204-27 PROHIBITION ON A BYTEDANCE COVERED APPLICATION (JUNE 2023).

FUNDING

The total contract value is increasing by \$694,000.00, from \$23,493,916.08 to \$24,187,916.08.

The total funded value is increasing by \$694,000.00, from \$9,520,096.30 to \$10,214,096.30.

PR EDOIES-23-000275 was received on June 5, 2023, and provides \$694,000 in total funds.

PERIOD OF PERFORMANCE

This modification does not affect the period of performance. The period of performance remains January 3, 2022, through January 2, 2027.

SYNOPSIS

There is no requirement for synopsisizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsisized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

SCOPE OF WORK

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

RECOMMENDATION

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00005.

The purpose of Modification P00005 for contract 91990022C0015 REL Central is the following:

- The Institution of Education Sciences has authorized 7.5 million of program funds to be made available to the 10 RELs to increase the total contract values on the 10 REL contracts for the 2022-2027 cycle. IES is statutorily obligated to allocate these additional program funds using the same funding formula that was used to determine the current total contract values for each REL region. As a result, REL Central will receive \$694,000 in additional contract value. In response to this contract value increase, REL Central's proposal documents dated July 17, 2023 are hereby incorporated into the contract.
- Incorporate a revised deliverable schedule
- In accordance with 3452.237- 70 SERVICES OF CONSULTANTS, paragraph (b)(1), the daily rate set forth in this contract will be \$1,100.00. This rate supersedes the previous daily rate of \$800.00.
- Change ACOR from Elizabeth Nolan to Heidi Gansen
- In accordance with FAC 2023-04 published June 2, 2023, this modification adds FAR 52.204- 27 PROHIBITION ON A BYTEDANCE COVERED APPLICATION (JUNE 2023).

The total contract value is increasing by \$694,000.00, from \$23,493,916.08 to \$24,187,916.08.

The total funded value is increasing by \$694,000.00, from \$9,520,096.30 to \$10,214,096.30.

Except as provided herein, all other terms and conditions of contract 91990022C0015 remains unchanged and in full force and effect.

Contractor's Statement of Release

In consideration of the modification agreed to herein as complete Equitable Adjustment for the updated Period of Performance, the contractor hereby releases the Government from all liability under this contract for further adjustments attributable to such facts or circumstances giving rise to this change.

SCHEDULE Continued

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| ITEM NO. | SUPPLIES/SERVICES | QUANTITY | UNIT | UNIT PRICE | AMOUNT |
|----------|---|----------|------|------------|------------|
| 0009 | <p>Contracting Officer: Joseph Gibbs, 202-245-6016, Joseph.Gibbs@ed.gov</p> <p>Primary Contracting Officer Representative: Amy Johnson, 202-208-7849, amy.johnson@ed.gov</p> <p>Alternate Contracting Officer Representative(s): Heidi Gansen, Heidi.Gansen@ed.gov</p> <p>Primary Technical Point of Contact: Heidi Gansen, Heidi.Gansen@ed.gov</p> <p>Alternate Technical Point(s) of Contact: None</p> <p>(New Line Item)</p> <p>Regional Educational Laboratories (REL) Central Cost Plus Fixed Fee</p> <p>Accounting and Appropriation Data: 1100M2023.B.2023.ER000000.RL2.2550A.000.117.0000.000000 \$694,000.00 FOB : Destination Period of Performance: 01/02/2022 to 01/02/2027</p> | 1.00 | SE | 694,000.00 | 694,000.00 |

ED 002720

| | | |
|-----------|--|---|
| SECTION H | SPECIAL CONTRACT REQUIREMENTS..... | 5 |
| H.1 | 52.204-27PROHIBITION ON A BYTEDANCE COVERED APPLICATION (JUNE 2023)..... | 5 |
| H.2 | 3452.237-70 SERVICES OF CONSULTANTS (MAY 2011)..... | 5 |
| SECTION J | LIST OF ATTACHMENTS..... | 6 |
| J.1 | Attachment B- Deliverable Schedule..... | 6 |

SECTION H

SPECIAL CONTRACT REQUIREMENTS

H.1 52.204-27 PROHIBITION ON A BYTEDANCE COVERED APPLICATION (JUNE 2023)

(a) Definitions. As used in this clause--

Covered application means the social networking service TikTok or any successor application or service developed or provided by ByteDance Limited or an entity owned by ByteDance Limited.

Information technology, as defined in 40 U.S.C. 11101(6)--

(1) Means any equipment or interconnected system or subsystem of equipment, used in the automatic acquisition, storage, analysis, evaluation, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information by the executive agency, if the equipment is used by the executive agency directly or is used by a contractor under a contract with the executive agency that requires the use--

(i) Of that equipment; or

(ii) Of that equipment to a significant extent in the performance of a service or the furnishing of a product;

(2) Includes computers, ancillary equipment (including imaging peripherals, input, output, and storage devices necessary for security and surveillance), peripheral equipment designed to be controlled by the central processing unit of a computer, software, firmware and similar procedures, services (including support services), and related resources; but

(3) Does not include any equipment acquired by a Federal contractor incidental to a Federal contract.

(b) Prohibition. Section 102 of Division R of the Consolidated Appropriations Act, 2023 (Pub. L. 117-328), the No TikTok on Government Devices Act, and its implementing guidance under Office of Management and Budget (OMB) Memorandum M-23-13, dated February 27, 2023, "No TikTok on Government Devices" Implementation Guidance, collectively prohibit the presence or use of a covered application on executive agency information technology, including certain equipment used by Federal contractors. The Contractor is prohibited from having or using a covered application on any information technology owned or managed by the Government, or on any information technology used or provided by the Contractor under this contract, including equipment provided by the Contractor's employees; however, this prohibition does not apply if the Contracting Officer provides written notification to the Contractor that an exception has been granted in accordance with OMB Memorandum M-23-13.

(c) Subcontracts. The Contractor shall insert the substance of this clause, including this paragraph (c), in all subcontracts, including subcontracts for the acquisition of commercial products or commercial services.

(End Of Clause)

H.2 3452.237-70 SERVICES OF CONSULTANTS (MAY 2011)

Except as otherwise expressly provided elsewhere in this contract, and notwithstanding the provisions of the clause of the contract entitled "Subcontracts" (FAR 52.244-2), the prior written approval of the contracting officer shall be required--

(a) If any employee of the contractor is to be paid as a "consultant" under this contract; and

(b)

(1) For the utilization of the services of any consultant under this contract exceeding the daily rate set forth elsewhere in this contract or, if no amount is set forth, \$800, exclusive of travel costs, or if the services of any consultant under this contract will exceed 10 days in any calendar year.

(2) If that contracting officer's approval is required, the contractor shall obtain and furnish to the contracting officer information concerning the need for the consultant services and the reasonableness of the fee to be paid, including, but not limited to, whether fees to be paid to any consultant exceed the lowest fee charged by the consultant to others for performing consultant services of a similar nature.

(End of Clause)

SECTION J
LIST OF ATTACHMENTS

J.1 Attachment B- Deliverable Schedule

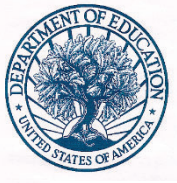
| Subtask | Deliverable number | Deliverable Name | Due date |
|--------------|--------------------|---|------------|
| 1.1.1.1.0 | | Redacted proposal | 3/11/2022 |
| 1.1.1.1.1 | | Summary of REL Kickoff Meeting | 4/14/2022 |
| 1.2.1.2.1.01 | | Biweekly/Bimonthly call agenda (3/16/22) | 3/14/2022 |
| 1.2.1.2.1.02 | | Biweekly/Bimonthly call summary memo (3/16/22) | 3/23/2022 |
| 1.2.1.2.1.03 | | Biweekly/Bimonthly call agenda (3/29/22) | 3/25/2022 |
| 1.2.1.2.1.04 | | Biweekly/Bimonthly call summary memo (3/29/22) | 4/5/2022 |
| 1.2.1.2.1.05 | | Biweekly/Bimonthly call agenda (4/12/22) | 4/8/2022 |
| 1.2.1.2.1.06 | | Biweekly/Bimonthly call summary memo (4/12/22) | 4/19/2022 |
| 1.2.1.2.1.07 | | Biweekly/Bimonthly call agenda (4/27/22) | 4/25/2022 |
| 1.2.1.2.1.08 | | Biweekly/Bimonthly call summary memo (4/27/22) | 5/4/2022 |
| 1.2.1.2.1.09 | | Biweekly/Bimonthly call agenda (5/11/22) | 5/9/2022 |
| 1.2.1.2.1.10 | | Biweekly/Bimonthly call summary memo (5/11/22) | 5/18/2022 |
| 1.2.1.2.1.11 | | Biweekly/Bimonthly call agenda (5/25/22) | 5/23/2022 |
| 1.2.1.2.1.12 | | Biweekly/Bimonthly call summary memo (5/25/22) | 6/1/2022 |
| 1.2.1.2.1.13 | | Biweekly/Bimonthly call agenda (6/8/22) | 6/6/2022 |
| 1.2.1.2.1.14 | | Biweekly/Bimonthly call summary memo (6/8/22) | 6/15/2022 |
| 1.2.1.2.1.15 | | Biweekly/Bimonthly call agenda (6/22/22) | 6/20/2022 |
| 1.2.1.2.1.16 | | Biweekly/Bimonthly call summary memo (6/22/22) | 6/29/2022 |
| 1.2.1.2.1.17 | | Biweekly/Bimonthly call agenda (7/6/22) | 7/1/2022 |
| 1.2.1.2.1.18 | | Biweekly/Bimonthly call summary memo (7/6/22) | 7/13/2022 |
| 1.2.1.2.1.19 | | Biweekly/Bimonthly call agenda (7/20/22) | 7/18/2022 |
| 1.2.1.2.1.20 | | Biweekly/Bimonthly call summary memo (7/20/22) | 7/27/2022 |
| 1.2.1.2.1.21 | | Biweekly/Bimonthly call agenda (8/3/22) | 8/1/2022 |
| 1.2.1.2.1.22 | | Biweekly/Bimonthly call summary memo (8/3/22) | 8/10/2022 |
| 1.2.1.2.1.23 | | Biweekly/Bimonthly call agenda (8/17/22) | 8/15/2022 |
| 1.2.1.2.1.24 | | Biweekly/Bimonthly call summary memo (8/17/22) | 8/24/2022 |
| 1.2.1.2.1.25 | | Biweekly/Bimonthly call agenda (8/31/22) | 8/29/2022 |
| 1.2.1.2.1.26 | | Biweekly/Bimonthly call summary memo (8/31/22) | 9/7/2022 |
| 1.2.1.2.1.27 | | Biweekly/Bimonthly call agenda (9/14/22) | 9/12/2022 |
| 1.2.1.2.1.28 | | Biweekly/Bimonthly call summary memo (9/14/22) | 9/21/2022 |
| 1.2.1.2.1.29 | | Biweekly/Bimonthly call agenda (9/28/22) | 9/26/2022 |
| 1.2.1.2.1.30 | | Biweekly/Bimonthly call summary memo (9/28/22) | 10/5/2022 |
| 1.2.1.2.1.31 | | Biweekly/Bimonthly call agenda (10/12/22) | 10/10/2022 |
| 1.2.1.2.1.32 | | Biweekly/Bimonthly call summary memo (10/12/22) | 10/19/2022 |
| 1.2.1.2.1.33 | | Biweekly/Bimonthly call agenda (10/26/22) | 10/24/2022 |
| 1.2.1.2.1.34 | | Biweekly/Bimonthly call summary memo (10/26/22) | 11/2/2022 |
| 1.2.1.2.1.35 | | Biweekly/Bimonthly call agenda (11/9/22) | 11/7/2022 |
| 1.2.1.2.1.36 | | Biweekly/Bimonthly call summary memo (11/9/22) | 11/16/2022 |
| 1.2.1.2.1.37 | | Biweekly/Bimonthly call agenda (11/23/22) | 11/21/2022 |
| 1.2.1.2.1.38 | | Biweekly/Bimonthly call summary memo (11/23/22) | 11/30/2022 |
| 1.2.1.2.1.39 | | Biweekly/Bimonthly call agenda (12/7/22) | 12/5/2022 |
| 1.2.1.2.1.40 | | Biweekly/Bimonthly call summary memo (12/7/22) | 12/14/2022 |
| 1.2.1.2.1.41 | | Biweekly/Bimonthly call agenda (12/21/22) | 12/19/2022 |
| 1.2.1.2.1.42 | | Biweekly/Bimonthly call summary memo (12/21/22) | 12/28/2022 |
| 1.2.1.2.1.43 | | Biweekly/Bimonthly call agenda (1/4/23) | 1/2/2023 |
| 1.2.1.2.1.44 | | Biweekly/Bimonthly summary memo (1/4/23) | 1/11/2023 |
| 1.2.1.2.1.45 | | Biweekly/Bimonthly call agenda (1/18/23) | 1/16/2023 |
| 1.2.1.2.1.46 | | Biweekly/Bimonthly summary memo (1/18/23) | 1/25/2023 |
| 1.2.1.2.1.47 | | Biweekly/Bimonthly call agenda (2/1/23) | 1/30/2023 |
| 1.2.1.2.1.48 | | Biweekly/Bimonthly summary memo (2/1/23) | 2/8/2023 |
| 1.2.1.2.1.49 | | Biweekly/Bimonthly call agenda (2/15/23) | 2/13/2023 |
| 1.2.1.2.1.50 | | Biweekly/Bimonthly summary memo (2/15/2023) | 2/22/2023 |
| 1.2.1.2.1.51 | | Biweekly/Bimonthly call agenda (3/1/23) | 2/27/2023 |
| 1.2.1.2.1.52 | | Biweekly/Bimonthly summary memo (3/1/23) | 3/8/2023 |
| 1.2.1.2.1.53 | | Biweekly/Bimonthly call agenda (3/15/2023) | 3/13/2023 |
| 1.2.1.2.1.54 | | Biweekly/Bimonthly summary memo (3/15/2023) | 3/22/2023 |
| 1.2.1.2.1.55 | | Biweekly/Bimonthly call agenda (3/29/2023) | 3/27/2023 |
| 1.2.1.2.1.56 | | Biweekly/Bimonthly Summary Memo (3/29/2023) | 4/5/2023 |
| 1.2.1.2.1.57 | | Biweekly/Bimonthly Call Agenda (4/12/23) | 4/10/2023 |
| 1.2.1.2.1.58 | | Biweekly/Bimonthly summary memo (4/12/2023) | 4/19/2023 |
| 1.2.1.2.1.59 | | Biweekly/Bimonthly Call Agenda (5/1/23) | 4/26/2023 |
| 1.2.1.2.1.60 | | Biweekly/Bimonthly summary memo (5/1/2023) | 5/8/2023 |
| 1.2.1.2.1.61 | | Biweekly/Bimonthly call agenda (5/10/23) | 5/8/2023 |
| 1.2.1.2.1.62 | | Biweekly/Bimonthly summary memo | 5/17/2023 |
| 1.2.1.2.1.63 | | Biweekly/bimonthly call agenda (5/24/23) | 5/22/2023 |
| 1.2.1.2.1.64 | | Biweekly/bimonthly summary memo (5/24/23) | 5/31/2023 |
| 1.2.1.2.1.65 | | Biweekly/Bimonthly call agenda (6/7/23) | 6/5/2023 |
| 1.2.1.2.1.66 | | Biweekly/Bimonthly summary memo (6/7/23) | 6/14/2023 |
| 1.2.1.2.1.67 | | Biweekly/Bimonthly call agenda (6/21/23) | 6/19/2023 |
| 1.2.1.2.1.68 | | Biweekly/Bimonthly summary memo (6/21/23) | 6/28/2023 |
| 1.2.1.2.1.69 | | Biweekly/Bimonthly call agenda (7/5/23) | 7/3/2023 |
| 1.2.1.2.1.70 | | Biweekly/Bimonthly summary memo (7/5/23) | 7/12/2023 |
| 1.2.1.2.1.71 | | Biweekly/Bimonthly call agenda (7/19/2023) | 7/17/2023 |
| 1.2.1.2.1.72 | | Biweekly/Bimonthly summary memo (7/19/23) | 7/26/2023 |
| 1.2.1.2.1.73 | | Biweekly/Bimonthly call agenda (8/2/23) | 7/31/2023 |
| 1.2.1.2.1.74 | | Biweekly/Bimonthly summary memo (8/2/23) | 8/9/2023 |
| 1.2.1.2.1.75 | | Biweekly/Bimonthly call agenda (8/16/23) | 8/14/2023 |
| 1.2.1.2.1.76 | | Biweekly/Bimonthly summary memo (8/16/2023) | 8/23/2023 |
| 1.2.1.2.1.77 | | Biweekly/Bimonthly call agenda (8/30/23) | 8/28/2023 |
| 1.2.1.2.1.78 | | Biweekly/Bimonthly summary memo (8/30/23) | 9/6/2023 |
| 1.2.1.2.1.79 | | Biweekly/Bimonthly call agenda (9/13/2023) | 9/11/2023 |
| 1.2.1.2.1.80 | | Biweekly/Bimonthly summary memo (9/13/2023) | 9/20/2023 |
| 1.2.1.2.1.81 | | Biweekly/Bimonthly call agenda (9/27/23) | 9/25/2023 |
| 1.2.1.2.1.82 | | Biweekly/Bimonthly summary memo (9/27/23) | 10/4/2023 |
| 1.2.1.2.1.83 | | Biweekly/Bimonthly Call agenda (10/11/23) | 10/9/2023 |
| 1.2.1.2.1.84 | | Biweekly/Bimonthly summary memo (10/11/23) | 10/18/2023 |
| 1.2.1.2.1.85 | | Biweekly/Bimonthly call agenda (10/25/2023) | 10/23/2023 |
| 1.2.1.2.1.86 | | Biweekly/Bimonthly summary memo (10/25/2023) | 11/1/2023 |
| 1.2.1.2.1.87 | | Biweekly/bimonthly call agenda (11/8/23) | 11/6/2023 |
| 1.2.1.2.1.88 | | Biweekly/bimonthly summary memo (11/8/2023) | 11/15/2023 |
| 1.2.1.2.1.89 | | Biweekly/Bimonthly call agenda (11/22/23) | 11/20/2023 |
| 1.2.1.2.1.90 | | Biweekly/Bimonthly summary memo (11/22/23) | 11/29/2023 |
| 1.2.1.2.1.91 | | Biweekly/Bimonthly call agenda (12/6/23) | 12/4/2023 |

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| 1.2.1.2.1.92 | Biweekly/Bimonthly summary memo (12/6/23) | 12/13/2023 |
| 1.2.1.2.1.93 | Biweekly/Bimonthly call agenda (12/20/23) | 12/18/2023 |
| 1.2.1.2.1.94 | Biweekly/Bimonthly summary memo (12/20/2023) | 12/27/2023 |
| 1.4.1.4.1.1 | Department presentation briefing materials | 12/29/2023 |
| 1.4.1.4.1.2 | Department presentation summary | 12/29/2023 |
| 1.5.1.5.0 | Report on the establishment of the Governing Board | 4/5/2022 |
| 1.5.1.5.1.1 | Draft meeting agenda and materials for Governing Board meeting (Spring 2022) | 7/15/2022 |
| 1.5.1.5.1.2 | Final meeting agendas and materials for Governing Board Meeting (Spring 2022) | 7/29/2022 |
| 1.5.1.5.1.3 | Governing Board meeting summary to IES (Spring 2022) | 8/19/2022 |
| 1.5.1.5.2.1 | Draft meeting agenda and materials for Governing Board meeting (Fall 2022) | 10/19/2022 |
| 1.5.1.5.2.2 | Final meeting agendas and materials for Governing Board Meeting (Fall 2022) | 11/2/2022 |
| 1.5.1.5.2.3 | Governing Board meeting summary to IES (Fall 2022) | 11/23/2022 |
| 1.5.1.5.3.1 | Draft meeting agenda and materials for Governing Board meeting (Spring 2023) | 4/21/2023 |
| 1.5.1.5.3.2 | Final meeting agenda and materials for Governing Board meeting (Spring 2023) | 5/5/2023 |
| 1.5.1.5.3.3 | Governing Board meeting summary to IES (Spring 2023) | 5/26/2023 |
| 1.5.1.5.4.1 | Draft meeting agenda and materials for Governing Board meeting (Fall 2023) | 11/7/2023 |
| 1.5.1.5.4.2 | Final meeting agenda and materials for Governing Board meeting (Fall 2023) | 11/14/2023 |
| 1.5.1.5.4.3 | Governing Board meeting summary to IES (Fall 2023) | 11/22/2023 |
| 1.6.1.6.1.1 | Bi-annual Assessment of Progress Report (Draft) | 6/30/2022 |
| 1.6.1.6.1.2 | Bi-annual Assessment of Progress Report (Final) | 6/30/2022 |
| 1.6.1.6.2.1 | Bi-annual Assessment of Progress Report (Draft) | 12/1/2022 |
| 1.6.1.6.2.2 | Bi-annual Assessment of Progress Report (Final) | 1/5/2023 |
| 1.6.1.6.3.1 | Bi-Annual Assessment of Progress Report (Draft) | 6/1/2023 |
| 1.6.1.6.3.2 | Bi-Annual Assessment of Progress Report (Final) | 7/3/2023 |
| 1.6.1.6.4.1 | Bi-Annual Assessment of Progress Report (Draft) | 12/1/2023 |
| 1.6.1.6.4.2 | Bi-Annual Assessment of Progress Report (Final) | 12/29/2023 |
| 1.7.1.7.01 | Monthly Progress Report | 4/14/2022 |
| 1.7.1.7.02 | Monthly Progress Report | 5/13/2022 |
| 1.7.1.7.03 | Monthly Progress Report | 6/14/2022 |
| 1.7.1.7.04 | Monthly Progress Report | 7/15/2022 |
| 1.7.1.7.05 | Monthly Progress Report | 8/12/2022 |
| 1.7.1.7.06 | Monthly Progress Report | 9/15/2022 |
| 1.7.1.7.07 | Monthly Progress Report | 10/17/2022 |
| 1.7.1.7.08 | Monthly Progress Report | 11/15/2022 |
| 1.7.1.7.09 | Monthly Progress Report | 12/14/2022 |
| 1.7.1.7.10 | Monthly Progress Report | 1/13/2023 |
| 1.7.1.7.11 | Monthly Progress Report | 2/14/2023 |
| 1.7.1.7.12 | Monthly Progress Report | 3/14/2023 |
| 1.7.1.7.13 | Monthly Progress Report | 4/14/2023 |
| 1.7.1.7.14 | Monthly Progress Report | 5/12/2023 |
| 1.7.1.7.15 | Monthly Progress Report | 6/14/2023 |
| 1.7.1.7.16 | Monthly Progress Report | 7/14/2023 |
| 1.7.1.7.17 | Monthly Progress Report | 8/14/2023 |
| 1.7.1.7.18 | Monthly Progress Report | 9/14/2023 |
| 1.7.1.7.19 | Monthly Progress Report | 10/13/2023 |
| 1.7.1.7.20 | Monthly Progress Report | 11/14/2023 |
| 1.7.1.7.21 | Monthly Progress Report | 12/14/2023 |
| 1.8.1.8.1 | Performance reporting | 6/28/2022 |
| 1.8.1.8.2 | Quarterly Performance Reporting (2022 Q4) | 9/28/2022 |
| 1.8.1.8.3 | Quarterly Performance Reporting (2023 Q1) | 1/9/2023 |
| 1.8.1.8.4 | Quarterly Performance Reporting (2023 Q2) | 3/27/2023 |
| 1.8.1.8.5 | Quarterly Performance Reporting (2023 Q3) | 6/28/2023 |
| 1.8.1.8.6 | Quarterly Performance Reporting (2023 Q4) | 9/28/2023 |
| 1.8.1.8.7 | Quarterly Performance Reporting (2024 Q1) | 12/28/2023 |
| 1.9.1.9.1 | Submission of security documents for low- and moderate-level clearances | As needed |
| 1.9.1.9.2.1 | Quarterly Cybersecurity Training | 6/1/2022 |
| 1.9.1.9.2.2 | Quarterly Cybersecurity Training | 9/7/2022 |
| 1.9.1.9.2.3 | Quarterly Cybersecurity Training | 2/13/2023 |
| 1.9.1.9.2.4 | Quarterly Cybersecurity Training | 5/15/2023 |
| 1.9.1.9.3.1 | 2022 IMR Training | 12/30/2022 |
| 2.1.2.1.0 | REL Planned Partnerships and Projects on the Topic of Teacher Workforce | 7/8/2022 |
| 2.1.2.1.1.1 | Cross-REL meeting agenda and materials | 8/31/2022 |
| 2.1.2.1.1.2 | Cross-REL meeting summary | 9/28/2022 |
| 2.1.2.1.2.1 | Teacher workforce leadership area meeting #2 agenda and materials | 11/16/2022 |
| 2.1.2.1.2.2 | Teacher workforce meeting #2 summary | 11/16/2022 |
| 2.1.2.1.3.1 | Cross-REL meeting agenda and materials, quarterly | 3/1/2023 |
| 2.1.2.1.3.2 | Cross-REL meeting summary, quarterly | 3/31/2023 |
| 2.1.2.1.3.3 | Teacher Workforce Community of Practice Infographic | 8/31/2023 |
| 2.1.2.1.4.1 | Cross-REL Meeting agenda and materials, quarterly | 5/23/2023 |
| 2.1.2.1.4.2 | Cross-REL Meeting summary, quarterly | 6/20/2023 |
| 2.1.2.1.5.1 | Cross-REL meeting agenda and materials, quarterly | 9/1/2023 |
| 2.1.2.1.5.2 | Cross-REL meeting summary, quarterly | 9/30/2023 |
| 2.1.2.1.6.1 | Cross-REL meeting agenda and materials, quarterly | 12/1/2023 |
| 2.1.2.1.6.2 | Cross-REL Meeting summary, quarterly | 12/31/2023 |
| 2.3.2.3.1 | Signed letter(s) of intent with each regional Comprehensive Center in REL region | 5/30/2022 |
| 2.3.2.3.2.1 | Joint needs sensing summary memo | 3/31/2023 |
| 3.1.3.1.1 | Partnership Proposal: DPS Identifying promising approaches for student-centered math instruction | 6/30/2022 |
| 3.1.3.1.2 | Partnership proposal: Strengthening culture-based education in Standing Rock | 6/1/2022 |
| 3.1.3.1.3 | Partnership proposal: Teacher diversity in Colorado | 8/31/2022 |
| 3.1.3.1.4 | Partnership proposal: Supporting postsecondary and workforce readiness of students in Kansas | 7/15/2022 |
| 3.1.3.1.5 | Partnership proposal: Teacher retention in Missouri | 7/29/2022 |
| 3.1.3.1.6 | Partnership proposal: Mitigating teacher shortages in Wyoming | 8/31/2022 |
| 3.1.3.1.7 | Partnership proposal: Accelerating math achievement in North Dakota | 9/16/2022 |
| 3.1.3.1.8 | Partnership proposal: Supporting elementary readers in Nebraska | 12/31/2023 |
| 3.1.3.1.9 | Partnership proposal: South Dakota on Human Capital Development in Educator Workforce to Alleviate Teacher Shortages partnership | 2/28/2023 |
| 3.2.3.2.10.2 | 2023 Partnership Stakeholder Feedback Survey Item Selection | 9/29/2023 |
| 3.2.3.2.10.3 | 2023 Annual Partnership Stakeholder Feedback Survey Responses | 11/30/2023 |
| 3.2.3.2.2.1 | Quarterly partnership meeting agenda and materials: Strengthening culture-based math education in Standing Rock | 10/31/2022 |
| 4.1.4.1.12.1 | North Dakota Evidence-based strategies for Differentiated instruction and blended learning concept paper | 8/31/2022 |

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| 4.1.4.1.12.2 | North Dakota Evidence-based strategies for differentiated instruction and blended learning project proposal | 11/30/2022 |
| 4.1.4.1.12.3 | North Dakota Evidence-based strategies for differentiated instruction and blended learning coaching session #1 materials | 2/28/2023 |
| 4.1.4.1.12.4 | North Dakota Evidence-based strategies for differentiated instruction and blended learning coaching session #2 materials | 3/31/2023 |
| 4.1.4.1.12.5 | North Dakota evidence based strategies for differentiated instruction and blended learning coaching session #3 materials | 4/28/2023 |
| 4.1.4.1.12.6 | North Dakota evidence based strategies for differentiated instruction and blended learning coaching session #4 materials | 5/31/2023 |
| 4.1.4.1.13.1 | Wyoming Support for Formative Evaluation of the Teacher Apprenticeship Concept Paper | 1/31/2023 |
| 4.1.4.1.13.2 | Wyoming Support for Formative Evaluation of the Teacher Apprenticeship Project Proposa | 3/31/2023 |
| 4.1.4.1.13.3 | Coaching Session #1 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 5/1/2023 |
| 4.1.4.1.13.4 | Coaching Session #2 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 6/8/2023 |
| 4.1.4.1.13.5 | Coaching Session #3 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 9/29/2023 |
| 4.1.4.1.13.6 | Coaching Session #4 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 4/30/2024 |
| 4.1.4.1.13.7 | Coaching Session #5 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 7/31/2024 |
| 4.1.4.1.13.8 | Stakeholder Feedback Survey: WY Support for Formative Evaluation of the Teacher Apprenticeship | 8/31/2024 |
| 4.1.4.1.14.1 | Project Concept Paper: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 11/10/2022 |
| 4.1.4.1.14.2 | Project Proposal: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 1/26/2023 |
| 4.1.4.1.14.3 | Technical Support Session #1 Materials: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 4/11/2023 |
| 4.1.4.1.14.4 | Technical Support Session #2 Materials: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts. | 6/16/2023 |
| 4.1.4.1.14.5 | Materials for Additional Support Session to provide guidance: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 10/31/2023 |
| 4.1.4.1.14.6 | Technical Support Session #3 Materials: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 12/29/2023 |
| 4.1.4.1.14.7 | Technical Support Session #4 Materials: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 4/30/2024 |
| 4.1.4.1.14.8 | Stakeholder Feedback Survey: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 7/31/2024 |
| 4.1.4.1.16.1 | Concept Paper: CO Factors Data Collection | 12/7/2022 |
| 4.1.4.1.16.2 | Project Proposal: CO Factors Data Collection | 2/24/2023 |
| 4.1.4.1.16.3 | Coaching Session #1 Materials: CO Factors Data Collection | 3/31/2023 |
| 4.1.4.1.16.4 | Coaching Session #2 Materials: CO Factors Data Collection | 7/26/2023 |
| 4.1.4.1.16.5 | Coaching Session #3 Materials: CO Factors Data Collection | 9/29/2023 |
| 4.1.4.1.16.6 | Coaching Session #4 Materials: CO Factors Data Collection | 12/29/2023 |
| 4.1.4.1.17.1 | Concept Paper: DPS Better Understanding students' perceptions of their experience in the grade 9 math classroom, highlighting those that facilitate or inhibit their success | 11/4/2022 |
| 4.1.4.1.17.2 | Project Proposal: DPS Better understanding students' perceptions of their experience in the grade 9 math classroom, highlighting those that facilitate or inhibit their success | 4/28/2023 |
| 4.1.4.1.17.3 | Coaching Session 1 Materials: Strengthening student pathways to success in 9th grade math in Denver Public Schools | 9/29/2023 |
| 4.1.4.1.17.4 | Coaching Session #2 Materials: Strengthening student pathways to success in 9th grade math in Denver Public Schools | 9/29/2023 |
| 4.1.4.1.17.5 | Coaching Session #3 Materials: Strengthening student pathways to success in 9th grade math in Denver Public Schools | 12/29/2023 |
| 4.1.4.1.17.6 | Coaching Session #4 Materials | 6/30/2024 |
| 4.1.4.1.17.7 | SFS Responses: Strengthening student pathways to success in 9th grade math in Denver Public Schools | 7/29/2024 |
| 4.1.4.1.2.1 | Project concept paper: Standing Rock Developing culture-based math modules and professional learning | 7/15/2022 |
| 4.1.4.1.2.10 | Standing Rock Developing culture-based math Phase 2 Resource Guide | 9/30/2024 |
| 4.1.4.1.2.11 | Standing Rock Developing culture-based math modules: Partnership-specific newsletter | 12/31/2023 |
| 4.1.4.1.2.12 | Standing Rock Developing culture-based math modules: Support for Summer 2024 professional learning efforts coaching materials | 9/30/2023 |
| 4.1.4.1.2.13 | Standing Rock Developing culture-based math modules: Support for Fall 2024 professional learning efforts coaching materials | 12/31/2024 |
| 4.1.4.1.2.14 | Stakeholder Feedback Survey: SR Developing culture-based math modules | 12/31/2024 |
| 4.1.4.1.2.2 | Project proposal: Standing Rock Developing culture-based math modules and professional learning | 9/28/2022 |
| 4.1.4.1.2.3 | Standing Rock Developing culture-based math modules and professional coaching session #1 materials | 1/6/2023 |
| 4.1.4.1.2.4 | Standing Rock Developing culture-based math modules and professional coaching session #2 materials | 4/28/2023 |
| 4.1.4.1.2.5 | Standing Rock Developing culture-based math modules: Phase 2 design institute and professional learning institute | 9/29/2023 |
| 4.1.4.1.2.6 | Standing Rock Developing culture-based math modules: Phase 1 reflection and revision session materials | 12/29/2023 |
| 4.1.4.1.2.7 | Standing Rock Developing culture-based math modules: Phase 2 design and refinement session materials | 2/29/2024 |
| 4.1.4.1.2.8 | Standing Rock Developing culture-based math modules: Phase 2 reflection and revisions session materials | 9/30/2024 |
| 4.1.4.1.2.9 | Standing Rock Developing culture-based education phase 1 resource guide | 5/31/2024 |
| 4.1.4.1.6.1 | Project Concept Paper: KS development of IPS implementation instruments and data collection processes | 8/19/2022 |
| 4.1.4.1.6.2 | Project proposal: KS development of IPS implementation instruments and data collection processes | 11/11/2022 |

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| 4.1.4.1.6.3 | KS Development of IPS implementation instruments and data collection processes: coaching materials 1 | 11/8/2022 |
| 4.1.4.1.6.4 | KS Development of IPS implementation instruments and data collection processes: Coaching Session Materials #2 | 1/6/2023 |
| 4.1.4.1.6.5 | KS Development of IPS implementation instruments and data collection processes: Technical Support to Develop Participation Scope and Synthesis | 5/12/2023 |
| 4.1.4.1.6.6 | KS Development of IPS implementation instruments and data collection processes: Coaching Session Materials #3 | 4/28/2023 |
| 4.1.4.1.6.7 | KS Development of IPS Implementation: Technical Support to Develop IPS Implementation and Participation: coaching session materials #4 | 9/29/2023 |
| 4.1.4.1.6.8 | KS Development of IPS Implementation Instruments: Stakeholder Feedback Survey | 12/29/2023 |
| 4.1.4.1.7.1 | Project Concept Paper: KS Summary of effective IPS practices | 9/16/2022 |
| 4.1.4.1.7.2 | Project proposal: KS Summary of effective IPS practices | 11/11/2022 |
| 4.1.4.1.8.1 | Project concept paper: MO Support District Tracking of New Teacher Experience: | 11/10/2022 |
| 4.1.4.1.8.2 | Project proposal: MO Support District Tracking of New Teacher Experience: | 2/16/2023 |
| 4.1.4.1.8.3 | Technical Support Focus Group Session #1 Materials: MO Support District Tracking of New Teacher Experiences | 4/28/2023 |
| 4.1.4.1.8.4 | Technical Support Focus Group Session #2 Materials: MO Support District Tracking of New Teacher Experiences | 7/3/2023 |
| 4.1.4.1.8.5 | Technical Support Session #3 Materials: MO Support District Tracking of New Teacher Experiences | 10/31/2023 |
| 4.1.4.1.8.6 | Technical Support Session #4 Materials: MO Support District Tracking of New Teacher Experiences | 3/29/2024 |
| 4.1.4.1.8.7 | Technical Support Session #5 Materials: MO Support District Tracking of New Teacher Experiences | 7/29/2024 |
| 4.1.4.1.8.8 | Stakeholder Feedback Survey: MO Support District Tracking of New Teacher Experience: | 7/29/2024 |
| 4.1.4.1.9.1 | Project Concept Paper: SD TBD Project | 4/28/2023 |
| 4.1.4.1.9.10 | Coaching Session 6 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 2/28/2025 |
| 4.1.4.1.9.11 | Coaching Session 7 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 9/30/2025 |
| 4.1.4.1.9.12 | Stakeholder Feedback Survey: SD learning from the design and implementation of the teacher apprenticeship pilot | 10/31/2025 |
| 4.1.4.1.9.2 | Project Proposal: Design of the Mentoring Component of the South Dakota Teacher Apprenticeship Pilot | 6/30/2023 |
| 4.1.4.1.9.3 | Coaching Session 1 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 6/12/2023 |
| 4.1.4.1.9.4 | Limited Literature Scan Materials: Identifying and summarizing relevant research evidence on the components of effective mentoring programs | 7/14/2023 |
| 4.1.4.1.9.5 | Coaching Session 2 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 12/29/2023 |
| 4.1.4.1.9.6 | Coaching Session 3 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 2/29/2024 |
| 4.1.4.1.9.7 | Stakeholder Feedback Survey: SD learning from the design and implementation of the teacher apprenticeship pilot | 3/29/2024 |
| 4.1.4.1.9.8 | Coaching Session 4 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 4/30/2024 |
| 4.1.4.1.9.9 | Coaching Session 5 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 9/30/2024 |
| 4.2.4.2.1.1 | AAE 1 proposal | 7/29/2022 |
| 4.2.4.2.1.2 | AAE MO Teacher Survey | 8/19/2022 |
| 4.2.4.2.1.3 | AAE 1 Summary | 9/14/2022 |
| 4.2.4.2.2.1 | AAE Quarterly REL Central Summary | 3/31/2023 |
| 4.2.4.2.3.1 | AAE Wyoming Teacher Retention Proposal | 1/5/2023 |
| 4.2.4.2.3.2 | AAE Wyoming Teacher Retention Summary and PowerPoint | 2/1/2023 |
| 4.2.4.2.3.3 | AAE WY Teacher Retention Summary | 3/14/2023 |
| 4.2.4.2.4.1 | AAE South Dakota Proposal | 3/16/2023 |
| 4.2.4.2.4.2 | AAE South Dakota PowerPoint | 4/28/2023 |
| 4.2.4.2.4.3 | AAE South Dakota SFS and Summary | 4/28/2023 |
| 4.2.4.2.5.1 | AAE KS Proposal | 6/9/2023 |
| 4.2.4.2.5.2 | AAE KS Written Summaries of the information collected and an associated PowerPoint Slide Deck | 6/30/2023 |
| 4.2.4.2.5.3 | AAE KS Summary | 7/31/2023 |
| 5.1.5.1.2.2 | Algebra Toolkit Efficacy Study Proposal | 9/29/2022 |
| 5.1.5.1.2.3 | Toolkit Study: Data Sharing agreement or memorandum of understanding with districts | 7/31/2024 |
| 5.1.5.1.2.4 | Toolkit Study: Toolkit evaluation draft OMB clearance package for data collection instrument: | 10/31/2023 |
| 5.1.5.1.2.5 | Toolkit Study: Toolkit evaluation draft OMB clearance package for recruitment materials | 4/28/2023 |
| 5.1.5.1.2.6 | Toolkit Study: Algebra toolkit efficacy study data collection instruments | 6/30/2023 |
| 5.1.5.1.2.7 | Toolkit Study: Toolkit evaluation white paper | 5/31/2026 |
| 5.1.5.1.5.1 | Project concept paper: Colorado Teacher Pipeline Study | 9/23/2022 |
| 5.1.5.1.6.1 | Project Concept Paper: MO Statewide Study to Identify Promising Mentoring Practices | 12/20/2022 |
| 5.1.5.1.6.2 | Project Proposal: MO Statewide Study to Identify Promising Mentoring Practices | 1/31/2023 |
| 5.1.5.1.6.3 | MOU/DSA: MO Statewide Study to Identify Promising Mentoring Practices | 12/29/2023 |
| 5.1.5.1.7.1 | Concept Paper: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful at math | 11/4/2022 |
| 5.1.5.1.7.2 | Project Proposal: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 4/28/2023 |
| 5.1.5.1.7.3 | MOU/DSA: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 12/29/2023 |
| 5.1.5.1.8.1 | Concept Paper: Understanding Implementation of IPS in Kansas | 9/29/2023 |
| 5.1.5.1.8.2 | Project Proposal: Understanding Implementation of IPS in Kansas | 12/29/2023 |
| 5.1.5.1.8.3 | MOU/DSA: Understanding Implementation of IPS in Kansas | 2/29/2024 |
| 5.1.5.1.8.4 | IRB approval or exemption: Understanding Implementation of IPS in Kansas | 3/29/2024 |
| 5.1.5.1.8.5 | Report: Understanding Implementation of IPS in Kansas | 1/31/2025 |
| 5.2.5.2.1.2 | Proposal for toolkit to support evidence-based Algebra instruction in middle and high school | 5/18/2022 |
| 5.2.5.2.1.3 | Toolkit Development Recruitment One-Pager | 8/3/2022 |
| 5.2.5.2.1.4 | Toolkit Development Storyboard and Script | 10/27/2022 |
| 5.2.5.2.1.5 | Toolkit Development: Submit Toolkit | 5/31/2024 |
| 5.2.5.2.1.6 | Toolkit Development: Summary of revisions to toolkit based on efficacy evaluation results | 11/30/2025 |
| 6.2.6.2.1.1 | Proposal: Infographic on REL CE and SR Partnership | 7/8/2022 |
| 6.2.6.2.1.2 | Standing Rock Infographic Content | 7/29/2022 |
| 6.2.6.2.1.3 | Standing Rock Infographic | 8/12/2022 |

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| 6.2.6.2.2.1 | Proposal: Fact Sheet on Culture-Based education and effect models of PC | 9/9/2022 |
| 6.2.6.2.2.2 | Fact sheet on Culture-based education and effect models of PD (Final) | 11/30/2022 |
| 6.2.6.2.3.1 | Proposal: Fact sheet Supporting School Transformation | 11/1/2022 |
| 6.2.6.2.4.1 | Proposal: KS understanding IPS Infographic or fact sheet | 10/28/2022 |
| 6.2.6.2.4.2 | Final: KS Understanding IPS Infographic | 5/31/2023 |
| 6.2.6.2.7.1 | Video summarizing the REL partnership with Standing Rock | 12/29/2023 |
| 6.2.6.2.8.1 | Proposal: IPS Goal Setting and Portfolio Fact Sheet | 4/28/2023 |
| 6.2.6.2.8.2 | Final: IPS Goal setting and portfolio fact sheet | 5/31/2023 |
| 6.2.6.2.9.1 | Draft: ND Evidence-Based strategies for differentiated instruction and blended learning infographic | 12/9/2022 |
| 6.2.6.2.9.2 | Final: ND Evidence-Based strategies for differentiated instruction and blended learning infographic | 12/21/2022 |
| 6.3.6.3.1 | NNERPP conference materials | 7/5/2022 |
| 6.3.6.3.2 | NNERPP conference summary | 8/3/2022 |
| 6.3.6.3.3 | Teacher diversity webinar proposal | 12/14/2022 |
| 6.3.6.3.4 | Teacher diversity webinar agenda and materials | 2/6/2023 |
| 6.3.6.3.5 | Teacher diversity webinar summary | 3/27/2023 |
| 6.3.6.3.6.1 | Webinar Proposal: Colorado Pipeline Webinar | 1/15/2023 |
| 6.3.6.3.6.2 | Webinar Agenda and Materials: Colorado Pipeline Webinar | 3/8/2023 |
| 6.3.6.3.6.3 | Webinar Summary: Colorado Pipeline Webinar | 4/19/2023 |
| 6.3.6.3.7.1 | NDIES Conference presentation proposal | 10/31/2023 |
| 6.3.6.3.7.2 | NDIES Conference presentation materials | 12/8/2023 |
| 6.4.6.4.1.1 | Draft newsletter (Summer 2022) | 6/9/2022 |
| 6.4.6.4.1.2 | Disseminate Final Newsletter (Summer 2022) | 6/30/2022 |
| 6.4.6.4.2.1 | Draft newsletter (Fall 2022) | 9/2/2022 |
| 6.4.6.4.3.1 | Draft Newsletter (Winter 2022) | 11/18/2022 |
| 6.4.6.4.3.2 | Final Newsletter (Winter 2022) | 12/30/2022 |
| 6.4.6.4.4.1 | Draft Newsletter (Spring 2023) | 3/3/2023 |
| 6.4.6.4.4.2 | Final Newsletter (Spring 2023) | 3/31/2023 |
| 6.4.6.4.5.1 | Draft Summer Newsletter 2023 | 6/1/2023 |
| 6.4.6.4.5.2 | Final Summer Newsletter 2023 | 6/30/2023 |
| 6.4.6.4.6.1 | Draft Fall Newsletter | 9/1/2023 |
| 6.4.6.4.6.2 | Final Fall Newsletter 2023 | 9/29/2023 |
| 6.4.6.4.7.1 | Draft Winter Newsletter 2023 | 12/1/2023 |
| 6.4.6.4.7.2 | Final Winter Newsletter 2023 | 12/29/2023 |
| 6.5.6.5.1.1 | Blog 1 | 7/29/2022 |
| 6.5.6.5.1.2 | Blog 2 | 8/24/2022 |
| 6.5.6.5.1.3 | Blog 3 | 10/10/2022 |
| 6.5.6.5.1.4 | Blog 4 | 12/14/2022 |
| 6.5.6.5.1.5 | Blog 5 | 4/28/2023 |
| 6.5.6.5.1.6 | Blog 6 | 8/31/2023 |
| 6.5.6.5.1.7 | Blog 7 | 10/31/2023 |
| 6.5.6.5.1.8 | Blog 8 | 12/29/2023 |
| 6.6.6.6.1.01 | Social media posts | 3/31/2022 |
| 6.6.6.6.1.02 | Social media posts | 4/29/2022 |
| 6.6.6.6.1.03 | Social media posts | 5/31/2022 |
| 6.6.6.6.1.04 | Social media posts | 6/30/2022 |
| 6.6.6.6.1.05 | Social media posts | 7/31/2022 |
| 6.6.6.6.1.06 | Social media posts | 8/31/2022 |
| 6.6.6.6.1.07 | Social media posts | 9/30/2022 |
| 6.6.6.6.1.08 | Social media posts | 10/28/2022 |
| 6.6.6.6.1.09 | Social media posts | 11/30/2022 |
| 6.6.6.6.1.10 | Social media posts | 12/30/2022 |
| 6.6.6.6.1.11 | Social media posts | 1/31/2023 |
| 6.6.6.6.1.12 | Social Media Posts | 2/28/2023 |
| 6.6.6.6.1.13 | Social Media Posts | 3/31/2023 |
| 6.6.6.6.1.14 | Social Media Posts | 4/28/2023 |
| 6.6.6.6.1.15 | Social Media Posts | 5/31/2023 |
| 6.6.6.6.1.16 | Social Media Posts | 6/30/2023 |
| 6.6.6.6.1.17 | Social Media Posts | 7/31/2023 |
| 6.6.6.6.1.18 | Social Media Posts | 8/31/2023 |
| 6.6.6.6.1.19 | Social Media Posts | 9/29/2023 |
| 6.6.6.6.1.20 | Social Media Posts | 10/31/2023 |
| 6.6.6.6.1.21 | Social Media Posts | 11/30/2023 |
| 6.6.6.6.1.22 | Social Media Posts | 12/29/2023 |
| 6.7.6.7.1 | Templates | 6/1/2022 |
| 6.7.6.7.2.1 | REL Central brochure | 9/30/2022 |



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF FINANCE AND OPERATIONS
OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

Determination and Findings to add Funding for Contract 91990022C0015 - REL Central P00006

| | |
|--------------------------------------|--|
| Contract Number: | 91990022C0015 - REL Central |
| Period of Performance: | January 3, 2022, through January 2, 2027 |
| Acquisition Plan Tracking Number: | 640 |
| Purchase Amount: | \$4,699,484.17 |
| NAICS Code: | 611710: Educational Support Services |
| Contractor: | Mathematica |
| UEI | T41EGEAK2L35 |
| Product and Service Code (PSC): | R499: Support Professional: Other |
| Service Contract Coding Declaration: | Other Function |

AUTHORITY

Modification P00006 is executed in accordance with the following contract clauses:
Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

BACKGROUND

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

PURPOSE/ DESCRIPTION OF CHANGES

The purpose of this modification is the following:

- Provide funds in the amount of \$4,699,484.17 for Year 3 of the contract
- Incorporate a revised deliverable schedule
- Change COR from Amy Johnson to Eric Mason
- Change ACOR from Heidi Gansen to Amy Johnson
- Add consultant Dr. Takako Nomi

FUNDING

The total contract value remains \$24,187,916.08.

The total funded value is increasing by \$4,699,484.17, from \$10,214,096.30 to \$14,913,580.50.

Confirmation of funds was received by Gloria Vera on October 18, 2023. Funding will be provided directly on the award via the contract writing system (CPSS).

PERIOD OF PERFORMANCE

This modification does not affect the period of performance. The period of performance remains January 3, 2022, through January 2, 2027.

SYNOPSIS

There is no requirement for synopsisizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsisized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

SCOPE OF WORK

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

RECOMMENDATION

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00006.

Recommend:



Revoked certificate

X Katie Opper

Ms. Katie Opper

Contract Specialist

Signed by: Office of Finance and Operations



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF FINANCE AND OPERATIONS
OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

MEMORANDUM

TO: Eric Mason, Contracting Officer's Representative (COR)

FROM: Joseph Gibbs, Contracting Officer

DATE : December 13, 2023

SUBJECT: DELEGATION AND APPOINTMENT OF CONTRACTING OFFICER'S
REPRESENTATIVE FOR

Regional

Under the clause of Contract No. 91990022C0015 and resulting contract with Mathematica.

1. This is to certify that Eric Mason of the Institute of Education Sciences (IES) is hereby appointed as the Contracting Officer's Representative (COR) for the above referenced contract.
2. This designation will remain in effect from contract award through contract termination unless sooner terminated in writing by the Contracting Officer or successor, or by reason of your reassignment, resignation, termination, or noncompliance with FAC-COR Certification maintenance requirements.
3. You must notify the Contracting Officer immediately if you receive notice of reassignment when you will be absent for an extended period of time or will otherwise be unable to fulfill the responsibilities of this position. In your absence, notification is to be given by your immediate superior. You are required to maintain current FAC-COR certification in accordance with program requirements. Details may be found on the Office of the Chief Financial Officer (OCFO) website on ConnectED.
4. The Contracting Officer (CO) is the exclusive agent of the Government with authority to enter into and administer contracts. Thus, the CO has the responsibility to see that all requirements of law and regulation are followed. However, as the CO's representative you are delegated the authority to monitor the technical effort being performed under the contract. You should familiarize yourself with the requirements of the contract and communicate with the Contractor as necessary to ensure the contractor is making satisfactory progress in performance of the contract. Other than the CO, you are the only Government employee who may direct the flow of technical matters between the Government and the Contractor.
5. A contract is a legally enforceable agreement that contains the rights and remedies of the parties. If the Contractor deviates from the terms of the contract, it is a matter between the Government

(represented by the CO) and the Contractor. You must keep the CO fully informed so that legally effective solutions can be applied to problems as they develop. Your suggestions to the Contractor may be construed as instructions and lead to claims for additional compensation or to a release of the Contractor from its obligations under the contract. Suggestions sometimes work out, but often lead to misunderstandings. Therefore, while you can and must make technical decisions, do not take any contract administration actions unless they are clearly authorized by this appointment.

6. A key agency responsibility is to thoroughly review, inspect, and accept, deliverables -- particularly to ensure that deliverables are authentic (not counterfeit) and meet quality requirements, as well as properly authorize payments. Proper authorization includes verifying that invoices exactly match orders. Do not authorize payment until you have ensured that the product/service was ordered, received, was acceptable, and was in accordance with the terms and conditions of the contract.
7. **AUTHORITY AND DUTIES:** You are hereby authorized by this designation to take any and all action with respect to the following which could lawfully be taken by the Contracting Officer, except any action specifically prohibited by the terms of the subject contract and paragraph 7, "LIMITATIONS," of this designation.
 - a. As the individual named in the contract as the COR, you are the sole person (other than the CO), after appropriate coordination with the PM, with the authority to communicate technical direction or to recommend final acceptance or rejection to the CO.
 - b. To prepare a COR Work plan and establish and maintain appropriate record-keeping files.
 - c. To review, evaluate and comment on any aspects of the contract and its performance to include problem areas, proposals, and technical issues, and to make written recommendations to the Contracting Officer.
 - d. To communicate and coordinate directly with the Contractor to the extent necessary to carry out your duties as COR except as prohibited in paragraph 8, "LIMITATIONS" of this designation.
 - e. To attend post-award, negotiation, and other conferences. Assist and participate in the post award orientation.
 - f. To coordinate site entry for Contractor/Government personnel as appropriate.
 - g. When site visits are conducted, compare actual accomplishments with scheduled and report performance. Be alert to changes in technical performance that may affect the financial status, personnel, or other elements of performance.
 - h. To ensure that Government Furnished Property (GFP), if provided in the contract (including software), is available when required and proper documentation is obtained when such property is transferred. Review the contractor's property control system and software

configuration management to ensure compliance with Government property clauses and recommend to the CO either approval or disapproval of the system.

- i. To ensure accountability of GFP and Contractor Acquired Property (CAP) is established upon receipt of the property and an auditable record of ownership is maintained (Leased Property must be included). Ensure that all Government property, whether government furnished, contractor acquired, leased or contractor fabricated is properly labeled and identified and that the property records are created and maintained.
- j. To monitor the acquisition, control, and disposition of Government Property by the contractor. Require reports by the contractor for any loss, damage, or destruction of property. To verify maintenance activities are performed.
- k. To ensure the contractor, in accordance with FAR 45.508, conducts accurate and timely periodic inventories according to an established schedule approved by the Property Administrator. Have the contractor submit electronic reports indicating the results of the inventories performed. Document upon discovery any discrepancies, or upon identification of misuse or loss, and resolve all discrepancies.
- l. To provide appropriate notification to the Contracting Officer in any instance when his/her immediate or expeditious decision is required. Immediately report contractor performance problems to the CO/CS.
- m. To prepare a written evaluation of the contractor's performance within 45 days after completion of any contract.
- n. To provide to the Contracting Officer sufficient evidence of a breach and suggestion for an appropriate contract remedy if a breach of contract is identified and assist in evaluating contractor response.
- o. To assist the CO in determining whether to terminate a contract.
- p. To review progress and financial reports, invoices, vouchers, and recommend approval or disapproval by the CO. To enter receipts into the Financial Management Support System (FMSS) after review of invoices/vouchers. In cost-reimbursement contracts exceeding \$100,000 estimated value, verify conformance with the clause "Payment for Overtime Premiums". Also recommend approval and disapproval of overtime in Labor-Hour or Time-and-Material contracts. Review and make timely recommendations to the CO as to the approval, disapproval, or other action to take concerning a contractor's submission of (or failure to submit) payment requests, deliverables, interim or final progress and financial reports, or any other requirements of the contract. Maintain a record/summary of payments to date to ensure that short-term progress is viewed as part of the whole to help monitor payment expenditures against total obligations.
- q. To maintain all necessary records to document and describe the performance of your duties as COR and to distribute such records as applicable, to include records of acceptance and/or rejection of contract deliverables. Should you reject any contract deliverables, a copy of the rejection notice should be forwarded to the Contracting Officer, and no payments should be

authorized for the rejected deliverable(s) until the issue has been resolved. You are required to submit annual written performance evaluations to the Contracting Officer concerning the Contractor's progress and performance of the work or items delivered. You are also required to submit any other reports as indicated in the Contract Monitoring Plan. If your designation is terminated for any reason before completion of the contract, you will turn over your records to the successor COR or obtain disposition instructions from the Contracting Officer.

r. To provide advice and assistance to the Contracting Officer in other areas of contract administration which are not specifically covered in this designation. Keep the CO informed of all communications with the contractor in order to prevent possible misunderstandings or situations that could become the basis for future claims against the Government. Only the requirements written in the contract can be asked of the contractor. If additional requirements seem necessary, discuss them with the CO and PM, but do not try to enforce them unless the CO modifies the contract in writing.

s. To review and recommend in writing contract modification requests or changes to the SOW and period of performance necessary to accomplish the objective of the contract. Prepare a technical evaluation to support a determination that the change is not outside the scope of the contract. For contractor-initiated changes, direct the contractor to submit a written description that includes the effect of the changes on the contract terms and conditions. Review the submission and send it to the CO with your recommendation.

t. To recommend, in writing, to the CO whether an option should be exercised under the contract (given a contract awarded with options and an option clause). Submit market research data to the CO to support the recommendation to exercise the option.

u. To submit procurement request(s) for additional services/tasks.

v. To assist the CO, if asked, in administering Stop Work Orders.

w. To notify the CO about a delay in the delivery or performance schedule under the contract.

x. To assist the CO in analyzing a claim, recommend a settlement position, and participate in the resolution process.

y. To advise the CO, at the completion of the contract, as to the receipt of all items, services and reports required under the contract, and the compliance with all contract provisions. Also, recommend a disposition of any Government Furnished/Contractor Acquired property in the possession of the contractor, and verify the usage of any Government-owned consumable furnished under the contract.

z. To ensure that security requirements for contractors are adhered to in accordance with ACS Directive OM: 5-101, Contractor Employee Personnel Security Screenings.

aa. To inform the CO in writing of any work being performed by the contractor that is not authorized in the scope of the contract.

8. LIMITATIONS: You are prohibited from taking any action with respect to the following:

- a. To authorize commencement of work at the beginning of a contract, or in circumstances involving an increase of work, unless and until the Contracting Officer has authorized the Contractor to proceed to work.
 - b. To encourage or approve, by word, actions, or omissions, any action by a contractor which would require the Contracting Officer's approval but has not received approval from the Contracting Officer.
 - c. To award, agree to, or sign any contract (including delivery and purchase orders) or modification thereto, or in any direct or indirect way to obligate the payment of money by the Government.
 - d. To give instructions or to make any form of agreement which affects the unit price, total contract price, quantity, quality, delivery schedule, or scope of work. Only the Contracting Officer can provide instructions and agreements of this type.
9. Unauthorized obligations made in relation to this contract must follow ratification procedures. Any unauthorized obligation may be denied by the ratifying official, leaving the individual who made the obligation personally liable. You must immediately report to the CO any unauthorized obligations that come to your attention.
10. The COR may nominate an assistant to act as his/her representative as a result of his/her absence; however, the nominee must be officially delegated the appropriate duties, in writing, by the Contracting Officer.
11. Written communications with the Contractor and any other contract related documents shall be signed as "Contracting Officer's Representative" (COR), with a copy furnished to the Contracting Officer.
12. By signing below, you certify that you have read, understand and agree to these instructions. You are also required to acknowledge receipt of this designation (or termination) in the space provided below. Return the original acknowledgement within ten (10) days to the Contracting Officer for retention in the contract file. A duplicate copy is provided for your records to be maintained in your COR files.

RECEIPT OF THIS DELEGATION AND APPOINTMENT IS HEREBY ACKNOWLEDGED. I HAVE READ AND FULLY UNDERSTAND THE AUTHORITY AND LIMITATIONS CONTAINED THEREIN:

X

Contracting Officer

X

Contracting Officer's Representative

This delegation is terminated effective the date of a signature by any contracting officer below:

X

Contracting Officer

X

Terminated Contracting Officer's Represent...

| AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT | | 1. CONTRACT ID CODE | | PAGE OF PAGES | |
|--|--|---------------------------------------|---|---|----|
| | | | | 1 | 17 |
| 2. AMENDMENT/MODIFICATION NUMBER 91990022C0015P00006 | | 3. EFFECTIVE DATE JAN 12, 2024 | | 4. REQUISITION/PURCHASE REQUISITION NUMBER | |
| 5. PROJECT NUMBER (If applicable) | | | | | |
| 6. ISSUED BY US Department of Education 400 Maryland Avenue SW, LBJ-2C274 Washington DC 20202 | | CODE CAMLBJ | | 7. ADMINISTERED BY (If other than Item 6) See Block 6 | |
| 8. NAME AND ADDRESS OF CONTRACTOR (Number, street, county, State and ZIP Code) MATHEMATICA INC. 600 ALEXANDER PARK SUITE 100 PRINCETON NJ 08540 | | UEI: T41EGEAK2L35 Cage Code: 1EFX9 | | | |
| | | <input checked="" type="checkbox"/> | | 9A. AMENDMENT OF SOLICITATION NUMBER | |
| | | <input type="checkbox"/> | | 9B. DATED (SEE ITEM 11) | |
| | | <input checked="" type="checkbox"/> | | 10A. MODIFICATION OF CONTRACT/ORDER NUMBER 91990022C0015 | |
| | | <input type="checkbox"/> | | 10B. DATED (SEE ITEM 13) MAR 02, 2022 | |
| CODE 00000011 | | FACILITY CODE | | | |
| 11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS | | | | | |
| <input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended. <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or electronic communication which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or electronic communication, provided each letter or electronic communication makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified. | | | | | |
| 12. ACCOUNTING AND APPROPRIATION DATA (If required) See Schedule | | | | | |
| Modification Amount: \$4,699,484.17 Modification Obligated Amount: \$4,699,484.17 | | | | | |
| 13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NUMBER AS DESCRIBED IN ITEM 14. | | | | | |
| CHECK ONE | | | | | |
| <input type="checkbox"/> A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NUMBER IN ITEM 10A. | | | | | |
| <input type="checkbox"/> B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). | | | | | |
| <input checked="" type="checkbox"/> C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 Alt I: Changes Cost Reimbursement | | | | | |
| <input type="checkbox"/> D. OTHER (Specify type of modification and authority) | | | | | |
| E. IMPORTANT: Contractor <input type="checkbox"/> is not <input checked="" type="checkbox"/> is required to sign this document and return <u>1</u> copies to the issuing office. | | | | | |
| 14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) Please see attached. | | | | | |
| Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect. | | | | | |
| 15A. NAME AND TITLE OF SIGNER (Type or print) Paula L Conner Sr. Director, Contract Administration 202-838-3679 pconner@mathematica-mpr.com | | | 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Katie Oppen, Contracting Officer 202-987-0207 Katie.Oppen@ed.gov | | |
| 15B. CONTRACTOR/OFFEROR Paula L Conner (Signature of person authorized to sign) | | 15C. DATE SIGNED 01/12/2024 | | 16B. UNITED STATES OF AMERICA Digitally signed by KATIE OPPER Date: 2024.01.12 14:24:51 -05'00' (Signature of Contracting Officer) | |
| | | | | 16C. DATE SIGNED JAN 12, 2024 | |

Previous edition unusable

STANDARD FORM 30 (REV. 11/2016)
Prescribed by GSA FAR (48 CFR) 53.243

ED 002737

The purpose of this modification is the following:

- Provide funds in the amount of \$4,699,484.17 for Year 3 of the contract
- Incorporate a revised deliverable schedule
- Change COR from Amy Johnson to Eric Mason
- Change ACOR from Heidi Gansen to Amy Johnson
- Add consultant Dr. Takako Nomi

The total contract value remains \$24,187,916.08.

The total funded value is increasing by \$4,699,484.17 , from \$10,214,096.30 to \$14,913,580.47.

Except as provided herein, all other terms and conditions of contract 91990022C0015 remains unchanged and in full force and effect.

Contractor's Statement of Release

In consideration of the modification agreed to herein as complete Equitable Adjustment for the updated Period of Performance, the contractor hereby releases the Government from all liability under this contract for further adjustments attributable to such facts or circumstances giving rise to this change.

| ITEM NO. | SUPPLIES/SERVICES | QUANTITY | UNIT | UNIT PRICE | AMOUNT |
|----------|---|----------|------|--------------|--------------|
| 0003 | <p>Contracting Officer: Katie Opper, 202-987-0207, Katie.Opper@ed.gov</p> <p>Primary Contracting Officer Representative: Eric Mason, 202-987-1355, eric.mason@ed.gov</p> <p>Alternate Contracting Officer Representative(s): Amy Johnson, 202-208-7849, amy.johnson@ed.gov</p> <p>Property Administrator Point of Contact: None</p> <p>Primary Technical Point of Contact: Amy Johnson, 202-208-7849, amy.johnson@ed.gov</p> <p>Alternate Technical Point(s) of Contact: None</p> <p>(Changed Line Item)</p> <p>Regional Educational Laboratories (REL) Central Year 3 of Performance (Non-travel)</p> <p>Accounting and Appropriation Data: 1100M2024.B.2024.ER000000.RL2.2550A.000.117.0000.000000 \$4,597,274.94 FOB : Destination Period of Performance: 01/03/2022 to 01/02/2027 Pricing Option: Cost-Plus-Fixed-Fee</p> | 1.00 | SE | 4,597,274.94 | 4,597,274.94 |
| 0010 | <p>(New Line Item)</p> <p>Regional Educational Laboratories (REL) Central Year 3 of Performance (Travel)</p> <p>Accounting and Appropriation Data: 1100M2024.B.2024.ER000000.RL2.2550A.000.117.0000.000000 \$102,209.23 FOB : Destination Period of Performance: 01/03/2022 to 01/02/2027 Pricing Option: Cost</p> | 1.00 | SE | 102,209.23 | 102,209.23 |

| | |
|---|---|
| SECTION G CONTRACT ADMINISTRATION DATA..... | 5 |
| G.1 3452.201-70CONTRACTING OFFICER`S REPRESENTATIVE (COR) (MAR 2011)..... | 5 |
| SECTION J LIST OF ATTACHMENTS..... | 6 |
| J.1 Attachment B- Deliverable Schedule..... | 6 |

SECTION G

CONTRACT ADMINISTRATION DATA

Eric Mason
Education Research Analyst
National Center for Education Evaluation and Regional Assistance (NCEE)

eric.mason@ed.gov

G.1 3452.201-70 CONTRACTING OFFICER`S REPRESENTATIVE (COR) (MAR 2011)

(a) The Contracting Officer`s Representative (COR) is responsible for the technical aspects of the project, technical liaison with the contractor, and any other responsibilities that are specified in the contract. These responsibilities include inspecting all deliverables, including reports, and recommending acceptance or rejection to the contracting officer.

(b) The COR is not authorized to make any commitments or otherwise obligate the Government or authorize any changes that affect the contract price, terms, or conditions. Any contractor requests for changes shall be submitted in writing directly to the contracting officer or through the COR. No such changes shall be made without the written authorization of the contracting officer.

(c) The COR`s name and contact information:

(d) The COR may be changed by the Government at any time, but notification of the change, including the name and address of the successor COR, will be provided to the contractor by the contracting officer in writing.

(End of Clause)

SECTION J

LIST OF ATTACHMENTS

J.1 Attachment B- Deliverable Schedule

| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|---|-------------------|--------------------|
| 1.1 | 1.1.0 | Redacted proposal | 3/11/2022 | |
| 1.1 | 1.1.1 | Summary of REL Kickoff Meeting | 4/14/2022 | |
| 1.2 | 1.2.1.01 | Biweekly/Bimonthly call agenda (3/16/22) | 3/14/2022 | |
| 1.2 | 1.2.1.02 | Biweekly/Bimonthly call summary memo (3/16/22) | 3/23/2022 | |
| 1.2 | 1.2.1.03 | Biweekly/Bimonthly call agenda (3/29/22) | 3/25/2022 | |
| 1.2 | 1.2.1.04 | Biweekly/Bimonthly call summary memo (3/29/22) | 4/5/2022 | |
| 1.2 | 1.2.1.05 | Biweekly/Bimonthly call agenda (4/12/22) | 4/8/2022 | |
| 1.2 | 1.2.1.06 | Biweekly/Bimonthly call summary memo (4/12/22) | 4/19/2022 | |
| 1.2 | 1.2.1.07 | Biweekly/Bimonthly call agenda (4/27/22) | 4/25/2022 | |
| 1.2 | 1.2.1.08 | Biweekly/Bimonthly call summary memo (4/27/22) | 5/4/2022 | |
| 1.2 | 1.2.1.09 | Biweekly/Bimonthly call agenda (5/11/22) | 5/9/2022 | |
| 1.2 | 1.2.1.10 | Biweekly/Bimonthly call summary memo (5/11/22) | 5/18/2022 | |
| 1.2 | 1.2.1.11 | Biweekly/Bimonthly call agenda (5/25/22) | 5/23/2022 | |
| 1.2 | 1.2.1.12 | Biweekly/Bimonthly call summary memo (5/25/22) | 6/1/2022 | |
| 1.2 | 1.2.1.13 | Biweekly/Bimonthly call agenda (6/8/22) | 6/6/2022 | |
| 1.2 | 1.2.1.14 | Biweekly/Bimonthly call summary memo (6/8/22) | 6/15/2022 | |
| 1.2 | 1.2.1.15 | Biweekly/Bimonthly call agenda (6/22/22) | 6/20/2022 | |
| 1.2 | 1.2.1.16 | Biweekly/Bimonthly call summary memo (6/22/22) | 6/29/2022 | |
| 1.2 | 1.2.1.17 | Biweekly/Bimonthly call agenda (7/6/22) | 7/1/2022 | |
| 1.2 | 1.2.1.18 | Biweekly/Bimonthly call summary memo (7/6/22) | 7/13/2022 | |
| 1.2 | 1.2.1.19 | Biweekly/Bimonthly call agenda (7/20/22) | 7/18/2022 | |
| 1.2 | 1.2.1.20 | Biweekly/Bimonthly call summary memo (7/20/22) | 7/27/2022 | |
| 1.2 | 1.2.1.21 | Biweekly/Bimonthly call agenda (8/3/22) | 8/1/2022 | |
| 1.2 | 1.2.1.22 | Biweekly/Bimonthly call summary memo (8/3/22) | 8/10/2022 | |
| 1.2 | 1.2.1.23 | Biweekly/Bimonthly call agenda (8/17/22) | 8/15/2022 | |
| 1.2 | 1.2.1.24 | Biweekly/Bimonthly call summary memo (8/17/22) | 8/24/2022 | |
| 1.2 | 1.2.1.25 | Biweekly/Bimonthly call agenda (8/31/22) | 8/29/2022 | |
| 1.2 | 1.2.1.26 | Biweekly/Bimonthly call summary memo (8/31/22) | 9/7/2022 | |
| 1.2 | 1.2.1.27 | Biweekly/Bimonthly call agenda (9/14/22) | 9/12/2022 | |
| 1.2 | 1.2.1.28 | Biweekly/Bimonthly call summary memo (9/14/22) | 9/21/2022 | |
| 1.2 | 1.2.1.29 | Biweekly/Bimonthly call agenda (9/28/22) | 9/26/2022 | |
| 1.2 | 1.2.1.30 | Biweekly/Bimonthly call summary memo (9/28/22) | 10/5/2022 | |
| 1.2 | 1.2.1.31 | Biweekly/Bimonthly call agenda (10/12/22) | 10/10/2022 | |
| 1.2 | 1.2.1.32 | Biweekly/Bimonthly call summary memo (10/12/22) | 10/19/2022 | |
| 1.2 | 1.2.1.33 | Biweekly/Bimonthly call agenda (10/26/22) | 10/24/2022 | |
| 1.2 | 1.2.1.34 | Biweekly/Bimonthly call summary memo (10/26/22) | 11/2/2022 | |
| 1.2 | 1.2.1.35 | Biweekly/Bimonthly call agenda (11/9/22) | 11/7/2022 | |
| 1.2 | 1.2.1.36 | Biweekly/Bimonthly call summary memo (11/9/22) | 11/16/2022 | |
| 1.2 | 1.2.1.37 | Biweekly/Bimonthly call agenda (11/23/22) | 11/21/2022 | |
| 1.2 | 1.2.1.38 | Biweekly/Bimonthly call summary memo (11/23/22) | 11/30/2022 | |
| 1.2 | 1.2.1.39 | Biweekly/Bimonthly call agenda (12/7/22) | 12/5/2022 | |
| 1.2 | 1.2.1.40 | Biweekly/Bimonthly call summary memo (12/7/22) | 12/14/2022 | |
| 1.2 | 1.2.1.41 | Biweekly/Bimonthly call agenda (12/21/22) | 12/19/2022 | |
| 1.2 | 1.2.1.42 | Biweekly/Bimonthly call summary memo (12/21/22) | 12/28/2022 | |
| 1.2 | 1.2.1.43 | Biweekly/Bimonthly call agenda (1/4/23) | 1/2/2023 | |
| 1.2 | 1.2.1.44 | Biweekly/Bimonthly summary memo (1/4/23) | 1/11/2023 | |
| 1.2 | 1.2.1.45 | Biweekly/Bimonthly call agenda (1/18/23) | 1/16/2023 | |
| 1.2 | 1.2.1.46 | Biweekly/Bimonthly summary memo (1/18/23) | 1/25/2023 | |
| 1.2 | 1.2.1.47 | Biweekly/Bimonthly call agenda (2/1/23) | 1/30/2023 | |
| 1.2 | 1.2.1.48 | Biweekly/Bimonthly summary memo (2/1/23) | 2/8/2023 | |
| 1.2 | 1.2.1.49 | Biweekly/Bimonthly call agenda (2/15/23) | 2/13/2023 | |
| 1.2 | 1.2.1.50 | Biweekly/Bimonthly summary memo (2/15/2023) | 2/22/2023 | |
| 1.2 | 1.2.1.51 | Biweekly/Bimonthly call agenda (3/1/23) | 2/27/2023 | |
| 1.2 | 1.2.1.52 | Biweekly/Bimonthly summary memo (3/1/23) | 3/8/2023 | |
| 1.2 | 1.2.1.53 | Biweekly/Bimonthly call agenda (3/15/2023) | 3/13/2023 | |
| 1.2 | 1.2.1.54 | Biweekly/Bimonthly summary memo (3/15/2023) | 3/22/2023 | |
| 1.2 | 1.2.1.55 | Biweekly/Bimonthly call agenda (3/29/2023) | 3/27/2023 | |
| 1.2 | 1.2.1.56 | Biweekly/Bimonthly Summary Memo (3/29/2023) | 4/5/2023 | |
| 1.2 | 1.2.1.57 | Biweekly/Bimonthly Call Agenda (4/12/23) | 4/10/2023 | |
| 1.2 | 1.2.1.58 | Biweekly/Bimonthly summary memo (4/12/2023) | 4/19/2023 | |
| 1.2 | 1.2.1.59 | Biweekly/Bimonthly Call Agenda (5/1/23) | 4/26/2023 | |
| 1.2 | 1.2.1.60 | Biweekly/Bimonthly summary memo (5/1/2023) | 5/8/2023 | |
| 1.2 | 1.2.1.61 | Biweekly/Bimonthly call agenda (5/10/23) | 5/8/2023 | |
| 1.2 | 1.2.1.62 | Biweekly/Bimonthly summary memo | 5/17/2023 | |
| 1.2 | 1.2.1.63 | Biweekly/bimonthly call agenda (5/24/23) | 5/22/2023 | |
| 1.2 | 1.2.1.64 | Biweekly/bimonthly summary memo (5/24/23) | 5/31/2023 | |
| 1.2 | 1.2.1.65 | Biweekly/Bimonthly call agenda (6/7/23) | 6/5/2023 | |
| 1.2 | 1.2.1.66 | Biweekly/Bimonthly summary memo (6/7/23) | 6/14/2023 | |

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| 1.2 1.2.1.67 | Biweekly/Bimonthly call agenda (6/21/23) | 6/19/2023 |
| 1.2 1.2.1.68 | Biweekly/Bimonthly summary memo (6/21/23) | 6/28/2023 |
| 1.2 1.2.1.69 | Biweekly/Bimonthly call agenda (7/5/23) | 7/3/2023 |
| 1.2 1.2.1.70 | Biweekly/Bimonthly summary memo (7/5/23) | 7/12/2023 |
| 1.2 1.2.1.71 | Biweekly/Bimonthly call agenda (7/19/2023) | 7/17/2023 |
| 1.2 1.2.1.72 | Biweekly/Bimonthly summary memo (7/19/23) | 7/26/2023 |
| 1.2 1.2.1.73 | Biweekly/Bimonthly call agenda (8/4/23) | 8/2/2023 |
| 1.2 1.2.1.74 | Biweekly/Bimonthly summary memo (8/2/23) | 8/11/2023 |
| 1.2 1.2.1.75 | Biweekly/Bimonthly call agenda (8/16/23) | 8/14/2023 |
| 1.2 1.2.1.76 | Biweekly/Bimonthly summary memo (8/16/2023) | 8/23/2023 |
| 1.2 1.2.1.77 | Biweekly/Bimonthly call agenda (8/30/23) | 8/28/2023 |
| 1.2 1.2.1.78 | Biweekly/Bimonthly summary memo (8/30/23) | 9/6/2023 |
| 1.2 1.2.1.79 | Biweekly/Bimonthly call agenda (9/13/2023) | 9/11/2023 |
| 1.2 1.2.1.80 | Biweekly/Bimonthly summary memo (9/13/2023) | 9/20/2023 |
| 1.2 1.2.1.81 | Biweekly/Bimonthly call agenda (9/27/23) | 9/25/2023 |
| 1.2 1.2.1.82 | Biweekly/Bimonthly summary memo (9/27/23) | 10/4/2023 |
| 1.2 1.2.1.83 | Biweekly/Bimonthly Call agenda (10/11/23) | 10/9/2023 |
| 1.2 1.2.1.84 | Biweekly/Bimonthly summary memo (10/11/23) | 10/18/2023 |
| 1.2 1.2.1.85 | Biweekly/Bimonthly call agenda (10/25/2023) | 10/23/2023 |
| 1.2 1.2.1.86 | Biweekly/Bimonthly summary memo (10/25/2023) | 11/1/2023 |
| 1.2 1.2.1.87 | Biweekly/bimonthly call agenda (11/8/23) | 11/9/2023 |
| 1.2 1.2.1.88 | Biweekly/bimonthly summary memo (11/8/2023) | 11/20/2023 |
| 1.2 1.2.1.89 | Biweekly/Bimonthly call agenda (11/22/23) | 11/16/2023 |
| 1.2 1.2.1.90 | Biweekly/Bimonthly summary memo (11/22/23) | 11/28/2023 |
| 1.2 1.2.1.91 | Biweekly/Bimonthly call agenda (12/12/23) | 12/8/2023 |
| 1.2 1.2.1.92 | Biweekly/Bimonthly summary memo (12/12/23) | 12/19/2023 |
| 1.2 1.2.1.93 | Biweekly/Bimonthly call agenda (12/20/23) | 12/18/2023 |
| 1.2 1.2.1.94 | Biweekly/Bimonthly summary memo (12/20/2023) | 12/27/2023 |
| 1.2 1.2.1.95 | Biweekly/bimonthly call agenda (1/3/24) | 12/29/2023 |
| 1.2 1.2.1.96 | Biweekly/bimonthly call summary (1/3/24) | 1/10/2024 |
| 1.2 1.2.1.97 | Biweekly/bimonthly call agenda (1/17/2024) | 1/12/2024 |
| 1.2 1.2.1.98 | Biweekly/bimonthly call summary (1/17/2024) | 1/24/2024 |
| 1.2 1.2.1.99 | Biweekly/bimonthly call agenda (1/31/2024) | 1/29/2024 |
| 1.2 1.2.1.100 | Biweekly/bimonthly call summary (1/31/2024) | 2/7/2024 |
| 1.2 1.2.1.101 | Biweekly/bimonthly call agenda (2/14/2024) | 2/12/2024 |
| 1.2 1.2.1.102 | Biweekly/bimonthly call summary (2/14/2024) | 2/22/2024 |
| 1.2 1.2.1.103 | Biweekly/bimonthly call agenda (2/28/2024) | 2/26/2024 |
| 1.2 1.2.1.104 | Biweekly/bimonthly call summary (2/28/2024) | 3/6/2024 |
| 1.2 1.2.1.105 | Biweekly/bimonthly call agenda (3/13/2024) | 3/11/2024 |
| 1.2 1.2.1.106 | Biweekly/bimonthly call summary (3/13/2024) | 3/20/2024 |
| 1.2 1.2.1.107 | Biweekly/bimonthly call agenda (3/27/2024) | 3/25/2024 |
| 1.2 1.2.1.108 | Biweekly/bimonthly call summary (3/27/2024) | 4/3/2024 |
| 1.2 1.2.1.109 | Biweekly/bimonthly call agenda (4/10/2024) | 4/8/2024 |
| 1.2 1.2.1.110 | Biweekly/bimonthly call summary (4/10/2024) | 4/17/2024 |
| 1.2 1.2.1.111 | Biweekly/bimonthly call agenda (4/24/2024) | 4/22/2024 |
| 1.2 1.2.1.112 | Biweekly/bimonthly call summary (4/24/2024) | 5/1/2024 |
| 1.2 1.2.1.113 | Biweekly/bimonthly call agenda (5/8/2024) | 5/6/2024 |
| 1.2 1.2.1.114 | Biweekly/bimonthly call summary (5/8/2024) | 5/15/2024 |
| 1.2 1.2.1.115 | Biweekly/bimonthly call agenda (5/22/2024) | 5/20/2024 |
| 1.2 1.2.1.116 | Biweekly/bimonthly call summary (5/22/2024) | 5/30/2024 |
| 1.2 1.2.1.117 | Biweekly/bimonthly call agenda (6/5/2024) | 6/3/2024 |
| 1.2 1.2.1.118 | Biweekly/bimonthly call summary (6/5/2024) | 6/12/2024 |
| 1.2 1.2.1.119 | Biweekly/bimonthly call agenda (6/20/2024) | 6/18/2024 |
| 1.2 1.2.1.120 | Biweekly/bimonthly call summary (6/20/2024) | 6/27/2024 |
| 1.2 1.2.1.121 | Biweekly/bimonthly call agenda (7/3/2024) | 7/1/2024 |
| 1.2 1.2.1.122 | Biweekly/bimonthly call summary (7/3/2024) | 7/11/2024 |
| 1.2 1.2.1.123 | Biweekly/bimonthly call agenda (7/17/2024) | 7/15/2024 |
| 1.2 1.2.1.124 | Biweekly/bimonthly call summary (7/17/2024) | 7/24/2024 |
| 1.2 1.2.1.125 | Biweekly/bimonthly call agenda (7/31/2024) | 7/29/2024 |
| 1.2 1.2.1.126 | Biweekly/bimonthly call summary (7/31/2024) | 8/7/2024 |
| 1.2 1.2.1.127 | Biweekly/bimonthly call agenda (8/14/2024) | 8/12/2024 |
| 1.2 1.2.1.128 | Biweekly/bimonthly call summary (8/14/2024) | 8/21/2024 |
| 1.2 1.2.1.129 | Biweekly/bimonthly call agenda (8/28/2024) | 8/26/2024 |
| 1.2 1.2.1.130 | Biweekly/bimonthly call summary (8/28/2024) | 9/5/2024 |
| 1.2 1.2.1.131 | Biweekly/bimonthly call agenda (9/11/2024) | 9/9/2024 |
| 1.2 1.2.1.132 | Biweekly/bimonthly call summary (9/11/2024) | 9/18/2024 |
| 1.2 1.2.1.133 | Biweekly/bimonthly call agenda (9/25/2024) | 9/23/2024 |
| 1.2 1.2.1.134 | Biweekly/bimonthly call summary (9/25/2024) | 10/2/2024 |
| 1.2 1.2.1.135 | Biweekly/bimonthly call agenda (10/9/2024) | 10/7/2024 |

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| 1.2 1.2.1.136 | Biweekly/bimonthly call summary (10/9/2024) | 10/17/2024 |
| 1.2 1.2.1.137 | Biweekly/bimonthly call agenda (10/23/2024) | 10/21/2024 |
| 1.2 1.2.1.138 | Biweekly/bimonthly call summary (10/23/2024) | 10/30/2024 |
| 1.2 1.2.1.139 | Biweekly/bimonthly call agenda (11/6/2024) | 11/4/2024 |
| 1.2 1.2.1.140 | Biweekly/bimonthly call summary (11/6/2024) | 11/14/2024 |
| 1.2 1.2.1.141 | Biweekly/bimonthly call agenda (11/20/2024) | 11/18/2024 |
| 1.2 1.2.1.142 | Biweekly/bimonthly call summary (11/20/2024) | 11/27/2024 |
| 1.2 1.2.1.143 | Biweekly/bimonthly call agenda (12/4/2023) | 12/2/2024 |
| 1.2 1.2.1.144 | Biweekly/bimonthly call summary (12/4/2023) | 12/11/2024 |
| 1.2 1.2.1.145 | Biweekly/bimonthly call agenda (12/18/2024) | 12/16/2024 |
| 1.2 1.2.1.146 | Biweekly/bimonthly call summary (12/18/2024) | 12/26/2024 |
| 1.2 1.2.1.147 | Biweekly/bimonthly call agenda (1/2/2025) | 12/30/2024 |
| 1.4 1.4.1.1 | Department presentation briefing materials | 12/29/2023 |
| 1.4 1.4.1.2 | Department presentation summary | 12/29/2023 |
| 1.5 1.5.0 | Report on the establishment of the Governing Board | 4/5/2022 |
| | Draft meeting agenda and materials for Governing Board meeting (Spring 2022) | 7/15/2022 |
| 1.5 1.5.1.1 | Final meeting agendas and materials for Governing Board Meeting (Spring 2022) | 7/29/2022 |
| 1.5 1.5.1.2 | Governing Board meeting summary to IES (Spring 2022) | 8/19/2022 |
| 1.5 1.5.1.3 | | |
| 1.5 1.5.2.1 | Draft meeting agenda and materials for Governing Board meeting (Fall 2022) | 10/19/2022 |
| 1.5 1.5.2.2 | Final meeting agendas and materials for Governing Board Meeting (Fall 2022) | 11/2/2022 |
| 1.5 1.5.2.3 | Governing Board meeting summary to IES (Fall 2022) | 11/23/2022 |
| | Draft meeting agenda and materials for Governing Board meeting (Spring 2023) | 4/21/2023 |
| 1.5 1.5.3.1 | Final meeting agenda and materials for Governing Board meeting (Spring 2023) | 5/5/2023 |
| 1.5 1.5.3.2 | Governing Board meeting summary to IES (Spring 2023) | 5/26/2023 |
| 1.5 1.5.3.3 | CARS Actuals | 7/26/2023 |
| 1.5 1.5.3.4 | | |
| 1.5 1.5.4.1 | Draft meeting agenda and materials for Governing Board meeting (Fall 2023) | 10/5/2023 |
| 1.5 1.5.4.2 | Final meeting agenda and materials for Governing Board meeting (Fall 2023) | 10/19/2023 |
| 1.5 1.5.4.3 | Governing Board meeting summary to IES (Fall 2023) | 12/29/2023 |
| 1.5 1.5.5.1 | Meeting Agenda and Materials (Spring 2024) | 4/26/2024 |
| 1.5 1.5.5.2 | Meeting Summary (Spring 2024) | 6/14/2024 |
| 1.5 1.5.6.1 | Meeting agenda and Materials (Fall 2024) | 9/26/2024 |
| 1.5 1.5.6.2 | Meeting Summary (Fall 2024) | 11/14/2024 |
| 1.6 1.6.1.1 | Bi-annual Assessment of Progress Report (Draft) | 6/30/2022 |
| 1.6 1.6.1.2 | Bi-annual Assessment of Progress Report (Final) | 6/30/2022 |
| 1.6 1.6.2.1 | Bi-annual Assessment of Progress Report (Draft) | 12/1/2022 |
| 1.6 1.6.2.2 | Bi-annual Assessment of Progress Report (Final) | 1/5/2023 |
| 1.6 1.6.3.1 | Bi-Annual Assessment of Progress Report (Draft) | 6/1/2023 |
| 1.6 1.6.3.2 | Bi-Annual Assessment of Progress Report (Final) | 7/3/2023 |
| 1.6 1.6.4.1 | Bi-Annual Assessment of Progress Report (Draft) | 12/1/2023 |
| 1.6 1.6.4.2 | Bi-Annual Assessment of Progress Report (Final) | 12/29/2023 |
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| 1.6 1.6.6 | Bi-annual Assessment of Progress Report | 12/2/2024 |
| 1.7 1.7.01 | Monthly Progress Report | 4/14/2022 |
| 1.7 1.7.02 | Monthly Progress Report | 5/13/2022 |
| 1.7 1.7.03 | Monthly Progress Report | 6/14/2022 |
| 1.7 1.7.04 | Monthly Progress Report | 7/15/2022 |
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| 1.7 1.7.07 | Monthly Progress Report | 10/17/2022 |
| 1.7 1.7.08 | Monthly Progress Report | 11/15/2022 |
| 1.7 1.7.09 | Monthly Progress Report | 12/14/2022 |
| 1.7 1.7.10 | Monthly Progress Report | 1/13/2023 |
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| 1.7 1.7.13 | Monthly Progress Report | 4/14/2023 |
| 1.7 1.7.14 | Monthly Progress Report | 5/12/2023 |
| 1.7 1.7.15 | Monthly Progress Report | 6/14/2023 |
| 1.7 1.7.16 | Monthly Progress Report | 7/14/2023 |
| 1.7 1.7.17 | Monthly Progress Report | 8/14/2023 |
| 1.7 1.7.18 | Monthly Progress Report | 9/15/2023 |
| 1.7 1.7.19 | Monthly Progress Report | 10/13/2023 |

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| 1.7 1.7.20 | Monthly Progress Report | 11/14/2023 |
| 1.7 1.7.21 | Monthly Progress Report | 12/14/2023 |
| 1.7 1.7.22 | Monthly Progress Report | 1/16/2024 |
| 1.7 1.7.23 | Monthly Progress Report | 2/14/2024 |
| 1.7 1.7.24 | Monthly Progress Report | 3/14/2024 |
| 1.7 1.7.25 | Monthly Progress Report | 4/12/2024 |
| 1.7 1.7.26 | Monthly Progress Report | 5/14/2024 |
| 1.7 1.7.27 | Monthly Progress Report | 6/14/2024 |
| 1.7 1.7.28 | Monthly Progress Report | 7/15/2024 |
| 1.7 1.7.29 | Monthly Progress Report | 8/14/2024 |
| 1.7 1.7.30 | Monthly Progress Report | 9/16/2024 |
| 1.7 1.7.31 | Monthly Progress Report | 10/15/2024 |
| 1.7 1.7.32 | Monthly Progress Report | 11/15/2024 |
| 1.7 1.7.33 | Monthly Progress Report | 12/13/2024 |
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| 1.8 1.8.2 | Quarterly Performance Reporting (2022 Q4) | 9/28/2022 |
| 1.8 1.8.3 | Quarterly Performance Reporting (2023 Q1) | 1/9/2023 |
| 1.8 1.8.4 | Quarterly Performance Reporting (2023 Q2) | 3/27/2023 |
| 1.8 1.8.5 | Quarterly Performance Reporting (2023 Q3) | 6/28/2023 |
| 1.8 1.8.6 | Quarterly Performance Reporting (2023 Q4) | 9/28/2023 |
| 1.8 1.8.7 | Quarterly Performance Reporting (2024 Q1) | 1/19/2024 Updated due date |
| 1.8 1.8.8 | Quarterly Performance Reporting (2024 Q2) | 3/29/2024 |
| 1.8 1.8.9 | Quarterly Performance Reporting (2024 Q3) | 6/28/2024 |
| 1.8 1.8.10 | Quarterly Performance Reporting (2024 Q4) | 9/30/2024 |
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| 1.9 1.9.1 | Submission of security documents for low- and moderate-level clearances | 3/15/2022 |
| 1.9 1.9.2.1 | Quarterly Cybersecurity Training | 6/1/2022 |
| 1.9 1.9.2.2 | Quarterly Cybersecurity Training | 9/7/2022 |
| 1.9 1.9.2.3 | Cybersecurity Training | 2/13/2023 |
| 1.9 1.9.2.4 | Quarterly Cybersecurity Training | 5/15/2023 |
| 1.9 1.9.2.5 | Quarterly Cybersecurity Training | 9/8/2023 |
| 1.9 1.9.2.6 | Quarterly Cybersecurity Training | 2/16/2024 |
| 1.9 1.9.3.1 | 2022 IMR Training | 12/30/2022 |
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| 2.1 2.1.1.1 | Cross-REL meeting agenda and materials, quarterly | 8/31/2022 |
| 2.1 2.1.1.2 | Cross-REL meeting summary | 9/28/2022 |
| 2.1 2.1.2.1 | Teacher workforce leadership area meeting 2 agenda and materials | 11/16/2022 |
| 2.1 2.1.2.2 | Teacher workforce meeting 2 summary | 11/16/2022 |
| 2.1 2.1.3.1 | Cross-REL meeting agenda and materials, quarterly | 3/1/2023 |
| 2.1 2.1.3.2 | Cross-REL meeting summary, quarterly | 3/31/2023 |
| 2.1 2.1.3.3 | Teacher Workforce Community of Practice Infographic Proposal | 8/31/2023 |
| 2.1 2.1.3.4 | Teacher Workforce Community of Practice Infographic | 12/29/2023 |
| 2.1 2.1.4.1 | Cross-REL Meeting agenda and materials, quarterly | 5/23/2023 |
| 2.1 2.1.4.2 | Cross-REL Meeting summary, quarterly | 6/20/2023 |
| 2.1 2.1.5.1 | Cross-REL meeting agenda and materials, quarterly | 9/30/2023 |
| 2.1 2.1.5.2 | Cross-REL meeting summary, quarterly | 11/7/2023 |
| 2.1 2.1.6.1 | Cross-REL meeting agenda and materials, quarterly | 1/17/2024 |
| 2.1 2.1.6.2 | Cross-REL meeting summary, quarterly | 2/14/2024 |
| 2.1 2.1.7.1 | Quarterly cross-REL meeting agenda and materials, Q1 | 3/15/2024 |
| 2.1 2.1.7.2 | Quarterly cross-REL meeting summary, Q1 | 4/12/2024 |
| 2.1 2.1.8.1 | Quarterly cross-REL meeting agenda and materials, Q2 | 6/14/2024 |
| 2.1 2.1.8.2 | Quarterly cross-REL meeting summary, Q2 | 7/12/2024 |
| 2.1 2.1.9.1 | Quarterly cross-REL meeting agenda and materials, Q3 | 9/16/2024 |
| 2.1 2.1.9.2 | Quarterly cross-REL meeting summary, Q3 | 10/11/2024 |
| 2.1 2.1.10.1 | Quarterly cross-REL meeting agenda and materials, Q4 | 11/15/2024 |
| 2.1 2.1.10.2 | Quarterly cross-REL meeting summary, Q4 | 12/13/2024 |
| 2.1 2.1.11.1 | Proposal for cross-REL product highlighting work across the program around teacher workforce | 9/20/2024 |
| 2.1 2.1.11.2 | Materials of cross-REL product highlighting work across the program around teacher workforce | 10/25/2024 |
| 2.3 2.3.1 | Signed letter(s) of intent with each regional Comprehensive Center in REL region | 5/30/2022 |
| 2.3 2.3.2.1 | Joint needs sensing summary memo | 3/31/2023 |
| 2.3 2.3.2.2 | Joint needs sensing summary memo | 3/29/2024 |

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| 3.1 3.1.1 | Partnership Proposal: DPS Identifying promising approaches for student-centered math instruction | 6/30/2022 |
| 3.1 3.1.2 | Partnership proposal: Strengthening culture-based education in Standing Rock | 6/1/2022 |
| 3.1 3.1.3 | Partnership proposal: Teacher diversity in Colorado | 8/31/2022 |
| 3.1 3.1.4 | Partnership proposal: Supporting postsecondary and workforce readiness of students in Kansas | 7/15/2022 |
| 3.1 3.1.5 | Partnership proposal: Teacher retention in Missouri | 7/29/2022 |
| 3.1 3.1.6 | Partnership Proposal: Mitigating teacher shortages in Wyoming | 8/31/2022 |
| 3.1 3.1.7 | Partnership proposal: Accelerating math achievement in North Dakota | 9/16/2022 |
| 3.1 3.1.8 | Partnership proposal: Supporting elementary readers in Nebraska | 7/31/2024 Updated due date |
| 3.1 3.1.9 | Partnership proposal: South Dakota on Human Capital Development in Educator Workforce to Alleviate Teacher Shortages partnership | 2/28/2023 |
| 3.2 3.2.1.1 | DPS Strengthening Student Pathways to Success in 9th Grade Math Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.2.1 | Quarterly partnership meeting agenda and materials: Strengthening culture-based math education in Standing Rock | 10/31/2022 |
| 3.2 3.2.2.2 | Standing Rock Strengthening Culture-Based Math Education Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.3.1 | Colorado Teacher Diversity Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.4.1 | Kansas Supporting postsecondary and workforce readiness of students Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.5.1 | Missouri Teacher Retention Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.6.1 | Wyoming Mitigating Teacher Shortages Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.7.1 | North Dakota Accelerating Math Achievement Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.9.1 | South Dakota Strengthening Teacher Pipeline Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.10.2 | 2023 Partnership Stakeholder Feedback Survey Item Selection | 9/29/2023 |
| 3.2 3.2.10.3 | 2023 Annual Partnership Stakeholder Feedback Survey Responses | 11/30/2023 |
| 3.2 3.2.10.4 | 2024 Annual Partnership Stakeholder Feedback Survey Responses | 11/29/2024 |
| 4.1 4.1.10.1 | NE Developing a Learning Agenda for Foundational Literacy Concept Paper | 1/19/2024 |
| 4.1 4.1.10.2 | NE Developing a Learning Agenda for Foundational Literacy Project Proposal | 7/31/2024 |
| 4.1 4.1.12.1 | North Dakota Evidence-based strategies for Differentiated instruction and blended learning concept paper | 8/31/2022 |
| 4.1 4.1.12.10 | Communities of Practice Coaching Session 1 Materials | 9/29/2023 |
| 4.1 4.1.12.11 | Community of Practice and Continuous Improvement Session 4 Materials | 2/13/2024 |
| 4.1 4.1.12.12 | Communities of Practice and Continuous Improvement Session 5 Materials | 3/26/2024 |
| 4.1 4.1.12.13 | Communities of Practice and Continuous Improvement Session 6 Materials | 4/30/2024 |
| 4.1 4.1.12.2 | North Dakota Evidence-based strategies for differentiated instruction and blended learning project proposal | 11/30/2022 |
| 4.1 4.1.12.3 | North Dakota Evidence-based strategies for differentiated instruction and blended learning coaching session 1 materials | 2/28/2023 |
| 4.1 4.1.12.4 | North Dakota Evidence-based strategies for differentiated instruction and blended learning coaching session 2 materials | 3/31/2023 |
| 4.1 4.1.12.5 | North Dakota evidence based strategies for differentiated instruction and blended learning coaching session 3 materials | 4/28/2023 |
| 4.1 4.1.12.6 | North Dakota evidence based strategies for differentiated instruction and blended learning coaching session 4 materials | 5/31/2023 |
| 4.1 4.1.12.7 | Introduction to the Community of Practice (CoP) and Continuous Improvement | 8/29/2023 |
| 4.1 4.1.12.8 | Communities of Practice and Continuous Improvement Session 2 Materials | 10/31/2023 |
| 4.1 4.1.12.9 | Communities of Practice and Continuous Practice Session 3 Materials | 1/2/2024 |
| 4.1 4.1.13.1 | Wyoming Support for Formative Evaluation of the Teacher Apprenticeship Concept Paper | 1/31/2023 |
| 4.1 4.1.13.2 | Wyoming Support for Formative Evaluation of the Teacher Apprenticeship Project Proposal | 3/31/2023 |
| 4.1 4.1.13.3 | Coaching Session 1 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 5/1/2023 |
| 4.1 4.1.13.4 | Coaching Session 2 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 6/8/2023 |
| 4.1 4.1.13.5 | Coaching Session 3 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 9/29/2023 |

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| 4.1 4.1.13.6 | Coaching Session 4 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 4/30/2024 |
| 4.1 4.1.13.7 | Coaching Session 5 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 7/31/2024 |
| 4.1 4.1.13.8 | Stakeholder Feedback Survey: WY Support for Formative Evaluation of the Teacher Apprenticeship | 8/31/2024 |
| 4.1 4.1.14.1 | Project Concept Paper: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 11/10/2022 |
| 4.1 4.1.14.2 | Project Proposal: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 1/26/2023 |
| 4.1 4.1.14.3 | Technical Support Session 1 Materials: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 4/11/2023 |
| 4.1 4.1.14.4 | Technical Support Session 2 Materials: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts. | 6/16/2023 |
| 4.1 4.1.14.5 | Materials for Additional Support Session to provide guidance: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 12/29/2023 |
| 4.1 4.1.14.6 | Technical Support Session 3 Materials: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 12/29/2023 |
| 4.1 4.1.14.7 | Technical Support Session 4 Materials: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 4/30/2024 |
| 4.1 4.1.14.8 | Stakeholder Feedback Survey: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 7/31/2024 |
| 4.1 4.1.16.1 | Concept Paper: CO Factors Data Collection | 12/7/2022 |
| 4.1 4.1.16.2 | Project Proposal: CO Factors Data Collection | 2/24/2023 |
| 4.1 4.1.16.3 | Coaching Session 1 Materials: CO Factors Data Collection | 3/31/2023 |
| 4.1 4.1.16.4 | Coaching Session 2 Materials: CO Factors Data Collection | 7/26/2023 |
| 4.1 4.1.16.5 | Coaching Session 3 Materials: CO Factors Data Collection | 9/29/2023 |
| 4.1 4.1.16.6 | Stakeholder Feedback Survey: CO Factors Data Collection | 12/29/2023 |
| 4.1 4.1.17.1 | Concept Paper: DPS Better Understanding students' perceptions of their experience in the grade 9 math classroom, highlighting those that facilitate or inhibit their success | 11/4/2022 |
| 4.1 4.1.17.9 | Technical support to develop and pilot an instrument to measure classroom discourse in the grade 9 math - Session 2 Materials | 1/31/2024 |
| 4.1 4.1.17.10 | Technical support to develop and pilot an instrument to measure classroom discourse in the grade 9 math - Session 3 Materials | 4/30/2024 |
| 4.1 4.1.17.2 | Project Proposal: DPS Better understanding students' perceptions of their experience in the grade 9 math classroom, highlighting those that facilitate or inhibit their success | 4/28/2023 |
| 4.1 4.1.17.7 | SFS Responses: Strengthening student pathways to success in 9th grade math in Denver Public Schools | 7/29/2024 |
| 4.1 4.1.17.8 | DPS grade 9 math classroom discourse coaching session 1 materials | 11/21/2023 |
| 4.1 4.1.18.1 | 4.1.18 WY Micro-Credentials Concept Paper | 12/29/2023 |
| 4.1 4.1.18.2 | 4.1.18 WY Micro-Credentials Proposal | 2/29/2024 |
| 4.1 4.1.2.1 | Project concept paper: Standing Rock Developing culture-based math modules and professional learning | 7/15/2022 |
| 4.1 4.1.2.10 | Standing Rock Developing culture-based math Phase 2 Resource Guide | 9/30/2024 |
| 4.1 4.1.2.11 | Standing Rock Developing Culture-Based Math Modules: Partnership-Specific Newsletter | 12/29/2023 |
| 4.1 4.1.2.12 | Standing Rock Developing Culture-Based Math Modules: Support for Summer 2024 Professional Learning Efforts Coaching materials | 7/12/2024 |
| 4.1 4.1.2.13 | Standing Rock Developing Culture-Based Math-Modules: Support for Fall 2024 Professional Learning Efforts Coaching Materials | 12/30/2024 |
| 4.1 4.1.2.14 | Stakeholder Feedback Survey: SR Developing Culture-Based Math Modules | 12/30/2024 |
| 4.1 4.1.2.2 | Project proposal: Standing Rock Developing culture-based math modules and professional learning | 9/28/2022 |
| 4.1 4.1.2.3 | Standing Rock Developing culture-based math modules and professional coaching session 1 materials | 1/6/2023 |
| 4.1 4.1.2.4 | Standing Rock Developing culture-based math modules and professional coaching session 2 materials | 4/28/2023 |

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| 4.1 4.1.2.5 | Standing Rock Developing culture-based math modules and professional coaching session 3 materials | 9/29/2023 |
| 4.1 4.1.2.6 | Standing Rock Developing culture-based math modules and professional coaching session 4 materials | 12/29/2023 |
| 4.1 4.1.2.7 | Standing Rock Developing culture-based math modules and professional coaching session 5 | 2/29/2024 |
| 4.1 4.1.2.8 | Standing Rock Developing culture-based math modules and professional coaching session 6 materials | 6/28/2024 |
| 4.1 4.1.2.9 | Standing Rock Developing culture-based education phase 1 resource guide | 5/31/2024 |
| 4.1 4.1.6.1 | Project Concept Paper: KS development of IPS implementation instruments and data collection processes | 8/19/2022 |
| 4.1 4.1.6.10 | 4.1.6 KS Technical Support to Develop IPS Implementation and Participation Resources Phase 2 Session 2 Materials | 6/14/2024 |
| 4.1 4.1.6.2 | Project proposal: KS development of IPS implementation instruments and data collection processes | 11/11/2022 |
| 4.1 4.1.6.3 | KS Development of IPS implementation instruments and data collection processes: coaching materials 1 | 11/8/2022 |
| 4.1 4.1.6.4 | KS Development of IPS implementation Instruments and Data Collection Processes: Coaching Session Materials 2 | 1/6/2023 |
| 4.1 4.1.6.5 | KS Development of IPS implementation instruments and data collection processes: Technical Support to Develop Participation Scope and Synthesis | 5/12/2023 |
| 4.1 4.1.6.6 | KS Development of IPS implementation instruments and data collection processes: Coaching Session Materials 3 | 4/28/2023 |
| 4.1 4.1.6.7 | KS Development of IPS Implementation: Technical Support to Develop IPS Implementation and Participation: coaching session materials 4 | 9/29/2023 |
| 4.1 4.1.6.8 | KS Development of IPS Implementation Instruments: Stakeholder Feedback Survey | 12/29/2023 |
| 4.1 4.1.6.9 | KS Technical Support to Develop IPS Implementation and Participation Resources Phase 2 Session 1 Materials | 1/31/2024 |
| 4.1 4.1.7.1 | Project Concept Paper: KS Summary of effective IPS practices | 9/16/2022 |
| 4.1 4.1.7.2 | Project proposal: KS Summary of effective IPS practices | 11/11/2022 |
| 4.1 4.1.8.1 | Project concept paper: MO Support District Tracking of New Teacher Experiences | 11/10/2022 |
| 4.1 4.1.8.2 | Project proposal: MO Support District Tracking of New Teacher Experiences | 2/16/2023 |
| 4.1 4.1.8.3 | Technical Support Focus Group Session 1 Materials: MO Support District Tracking of New Teacher Experiences | 4/28/2023 |
| 4.1 4.1.8.4 | Technical Support Focus Group Session 2 Materials: MO Support District Tracking of New Teacher Experiences | 7/3/2023 |
| 4.1 4.1.8.5 | Technical Support Session 3 Materials: MO Support District Tracking of New Teacher Experiences | 10/31/2023 |
| 4.1 4.1.8.6 | Technical Support Session 4 Materials: MO Support District Tracking of New Teacher Experiences | 3/29/2024 |
| 4.1 4.1.8.7 | Technical Support Session #5 Materials: MO Support District Tracking of New Teacher Experiences | 7/29/2024 |
| 4.1 4.1.8.8 | Stakeholder Feedback Survey: MO Support District Tracking of New Teacher Experiences | 8/12/2024 |
| 4.1 4.1.9.1 | Project Concept Paper: SD TBD Project | 4/28/2023 |
| 4.1 4.1.9.10 | Coaching Session 6 Materials: SD Learning from the design and implementation of the teacher apprenticeship pilot | 2/28/2025 |
| 4.1 4.1.9.11 | Coaching Session 7 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 9/30/2025 |
| 4.1 4.1.9.12 | Stakeholder Feedback Survey: SD learning from the design and implementation of the teacher apprenticeship pilot | 10/31/2025 |
| 4.1 4.1.9.2 | Project Proposal: Design of the Mentoring Component of the South Dakota Teacher Apprenticeship Pilot | 6/30/2023 |
| 4.1 4.1.9.3 | Coaching Session 1 Materials: Coaching to Apply insights from limited literature search in the initial design of the mentoring component | 6/12/2023 |
| 4.1 4.1.9.4 | Limited Literature Scan Materials: Identifying and summarizing relevant research evidence on the components of effective mentoring programs | 6/12/2023 |
| 4.1 4.1.9.5 | Coaching Session 2 Materials: Collaboratively collecting, interpreting, and using data to inform improvements to the mentoring program in its first year | 12/29/2023 |
| 4.1 4.1.9.6 | Coaching Session 3 Materials: Collaborative collecting, interpreting, and using data to inform improvements to the mentoring program in its first year | 2/29/2024 |

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| 4.1 4.1.9.8 | Coaching session 4 materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 4/30/2024 |
| 4.1 4.1.9.9 | Coaching Session 5 Materials: SD Learning from the design and implementation of the teacher apprenticeship pilot | 9/30/2024 |
| 4.1 4.1.9.7 | Stakeholder Feedback Survey: SD learning from the design and implementation of the teacher apprenticeship pilot | 3/29/2024 |
| 4.2 4.2.1.1 | AAE 1 proposal | 7/29/2022 |
| 4.2 4.2.1.2 | AAE MO Teacher Survey | 8/19/2022 |
| 4.2 4.2.1.3 | AAE 1 Summary | 9/14/2022 |
| 4.2 4.2.2.1 | AAE 2 Quarterly REL Central Summary | 3/31/2023 |
| 4.2 4.2.3.1 | AAE Wyoming Teacher Retention Proposal | 1/5/2023 |
| 4.2 4.2.3.2 | AAE Wyoming Teacher Retention Summary and PowerPoint | 2/1/2023 |
| 4.2 4.2.3.3 | AAE WY Teacher Retention Summary | 3/14/2023 |
| 4.2 4.2.4.1 | AAE South Dakota Proposal | 3/16/2023 |
| 4.2 4.2.4.2 | AAE South Dakota PowerPoint | 4/28/2023 |
| 4.2 4.2.4.3 | AAE South Dakota SFS and Summary | 4/28/2023 |
| 4.2 4.2.5.1 | AAE KS Proposal | 6/9/2023 |
| | AAE KS Written Summaries of the information collected and an associated PowerPoint Slide Deck | 6/30/2023 |
| 4.2 4.2.5.2 | AAE KS Summary | 7/31/2023 |
| 4.2 4.2.5.3 | AAE Proposal - DPS Math Discourse | 9/27/2023 |
| 4.2 4.2.6.1 | AAE Materials - DPS Math Discourse | 10/18/2023 |
| 4.2 4.2.6.2 | AAE Summary - DPS Math Discourse | 11/9/2023 |
| 4.2 4.2.7.1 | AAE Proposal - Wyoming Student Micro-Credentials | 11/13/2023 |
| 4.2 4.2.7.2 | AAE Materials - WY Student Micro-Credentials | 1/9/2024 Corrected due date |
| 4.2 4.2.7.3 | AAE Summary - WY Student Micro-Credentials | 1/23/2024 |
| 4.2 4.2.8.1 | AAE Proposal - CDE Reduced Calendar | 12/27/2023 |
| 4.2 4.2.8.2 | AAE materials- CDE Reduced Calendar | 1/9/2024 |
| 4.2 4.2.8.3 | AAE summary- CDE Reduced Calendar | 1/23/2024 |
| 5.1 5.1.2.2 | Algebra Toolkit Efficacy Study Proposal | 9/29/2022 |
| | Toolkit Study: Data Sharing agreement or memorandum of understanding with districts | 7/31/2024 |
| 5.1 5.1.2.3 | Toolkit Study: Toolkit evaluation draft OMB clearance package for data collection instruments | 10/31/2023 |
| 5.1 5.1.2.4 | Toolkit Study: Toolkit evaluation draft OMB clearance package for recruitment materials | 4/28/2023 |
| 5.1 5.1.2.5 | Toolkit Study: Algebra toolkit efficacy study data collection instruments | 6/30/2023 |
| 5.1 5.1.2.6 | Toolkit Study: Toolkit evaluation white paper | 5/31/2026 |
| 5.1 5.1.2.7 | Algebra Toolkit Efficacy Study IRB application | 12/29/2023 |
| 5.1 5.1.2.8 | Project concept paper: Colorado Teacher Pipeline Study | 9/23/2022 |
| 5.1 5.1.5.1 | Project Concept Paper: MO Statewide Study to Identify Promising Mentoring Practices | 12/20/2022 |
| 5.1 5.1.6.1 | Project Proposal: MO Statewide Study to Identify Promising Mentoring Practices | 1/31/2023 |
| 5.1 5.1.6.2 | MOU/DSA: MO Statewide Study to Identify Promising Mentoring Practices | 12/29/2023 |
| 5.1 5.1.6.3 | Concept Paper: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful at math | 11/4/2022 |
| 5.1 5.1.7.1 | Project Proposal: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 4/28/2023 |
| 5.1 5.1.7.2 | MOU/DSA: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 12/29/2023 |
| 5.1 5.1.7.3 | Concept Paper: Understanding Implementation of IPS in Kansas | 9/29/2023 |
| 5.1 5.1.8.1 | Project Proposal: Understanding Implementation of IPS in Kansas | 12/29/2023 |
| 5.1 5.1.8.2 | MOU/DSA: Understanding Implementation of IPS in Kansas | 2/29/2024 |
| 5.1 5.1.8.3 | IRB Approval or exemption: Understanding Implementation of IPS in Kansas | 3/29/2024 |
| 5.1 5.1.8.4 | Report: Understanding Implementation of IPS in Kansas | 1/31/2025 |
| 5.1 5.1.8.5 | Proposal for toolkit to support evidence-based Algebra instruction in middle and high school | 5/18/2022 |
| 5.2 5.2.1.2 | Toolkit Development Recruitment One-Pager | 8/3/2022 |
| 5.2 5.2.1.3 | Toolkit Development Storyboard and Script | 10/27/2022 |
| 5.2 5.2.1.4 | Toolkit Development: Submit Toolkit | 5/31/2024 |
| 5.2 5.2.1.5 | Toolkit Development: Summary of revisions to toolkit based on efficacy evaluation results | 11/30/2025 |
| 6.2 6.2.1.1 | Proposal: Infographic on REL CE and SR Partnership | 7/8/2022 |
| 6.2 6.2.1.2 | Standing Rock Infographic Content | 7/29/2022 |
| 6.2 6.2.1.3 | Standing Rock Infographic | 8/12/2022 |
| 6.2 6.2.2.1 | Proposal: Fact Sheet on Culture-Based education and effect models of PD | 9/9/2022 |

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| 6.2 6.2.2.2 | Fact sheet on Culture-based education and effect models of PD (Final) | 11/30/2022 |
| 6.2 6.2.3.1 | Proposal: Fact sheet Supporting School Transformation | 11/1/2022 |
| 6.2 6.2.4.1 | Proposal: KS understanding IPS infographic or fact sheet | 10/28/2022 |
| 6.2 6.2.4.2 | Final: KS Understanding IPS Infographic | 5/31/2023 |
| 6.2 6.2.7.1 | Proposal: Video summarizing the REL partnership with Standing Rock | 3/1/2024 Updated due date |
| 6.2 6.2.7.2 | Video storyboard and script: REL partnership with Standing Rok | 4/30/2024 |
| 6.2 6.2.7.3 | Video: REL partnership with Standing Rock | 7/31/2024 |
| 6.2 6.2.8.1 | Proposal: IPS Goal Setting and Portfolio Fact Sheet | 4/28/2023 |
| 6.2 6.2.8.2 | Final: IPS Goal setting and portfolio fact sheet | 5/31/2023 |
| 6.2 6.2.9.1 | Draft: ND Evidence-Based strategies for differentiated instruction and blended learning infographic | 12/9/2022 |
| 6.2 6.2.9.2 | Final: ND Evidence-Based strategies for differentiated instruction and blended learning infographic | 12/21/2022 |
| 6.2 6.2.10.1 | Kansas Video Proposal | 8/8/2023 |
| 6.2 6.2.10.2 | Kansas IPS Video Materials | 8/30/2023 |
| 6.2 6.2.10.3 | Kansas IPS Final Video | 9/29/2023 |
| 6.2 6.2.11.1 | Teacher Apprenticeship Infographic Proposal | 9/27/2023 |
| 6.2 6.2.11.2 | Teacher Apprenticeship Infographic | 11/30/2023 |
| 6.2 6.2.12.1 | Proposal: South Dakota Strengthening Teacher Pipelines Dissemination Product | 7/1/2024 |
| 6.2 6.2.12.2 | Draft: South Dakota Strengthening Teacher Pipelines Dissemination Product | 7/31/2024 |
| 6.2 6.2.12.3 | Final: South Dakota Strengthening Teacher Pipelines Dissemination Product | 9/30/2024 |
| 6.2 6.2.13.1 | Proposal: North Dakota Developing Math Achievement Dissemination Product | 10/1/2024 |
| 6.2 6.2.13.2 | Draft: North Dakota Developing Math Achievement Dissemination Product | 10/31/2024 |
| 6.2 6.2.13.3 | Final: South Dakota Strengthening Teacher Pipelines Dissemination Product | 12/31/2024 |
| 6.2 6.2.14.1 | Proposal: Nebraska Supporting Elementary Readers Dissemination Product | 10/1/2024 |
| 6.2 6.2.14.2 | Draft: Nebraska Supporting Elementary Readers Dissemination Product | 10/31/2024 Corrected due date |
| 6.2 6.2.14.3 | Final: Nebraska Supporting Elementary Readers Dissemination Product | 12/31/2024 Corrected due date |
| 6.2 6.2.15.1 | Proposal: Colorado Teacher Diversity Dissemination Product | 10/1/2024 |
| 6.2 6.2.15.2 | Draft: Colorado Teacher Diversity Dissemination Product | 10/31/2024 Corrected due date |
| 6.2 6.2.15.3 | Final: Colorado Teacher Diversity Dissemination Product | 12/31/2024 Corrected due date |
| 6.2 6.2.16.1 | Proposal: Denver Public School Support 9th Grade Math Student Success Dissemination Product | 10/1/2024 |
| 6.2 6.2.16.2 | Draft: Denver Public School Support 9th Grade Math Student Success Dissemination Product | 10/31/2024 |
| 6.2 6.2.16.3 | Final: Denver Public School Support 9th Grade Math Student Success Dissemination Product | 12/31/2024 |
| 6.2 6.2.17.1 | Proposal: Kansas Supporting Postsecondary and Workforce Readiness Infographic 3 part series | 10/1/2024 |
| 6.2 6.2.17.2.1 | Draft: Guide 1 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 10/31/2024 |
| 6.2 6.2.17.3.1 | Draft: Guide 2 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 |
| 6.2 6.2.17.4.1 | Draft: Guide 3 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 10/31/2024 |
| 6.2 6.2.17.2.2 | Final: Guide 1 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 |
| 6.2 6.2.17.3.2 | Final: Guide 2 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 |
| 6.2 6.2.17.4.2 | Final: Guide 3 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 |
| 6.2 6.2.18.1 | Proposal: Wyoming Mitigating Teacher Shortages Dissemination Product | 10/1/2024 |
| 6.2 6.2.18.2 | Draft: Wyoming Mitigating Teacher Shortages Dissemination Product | 10/31/2024 |
| 6.2 6.2.18.3 | Final: Wyoming Mitigating Teacher Shortages Dissemination Product | 12/31/2024 |
| 6.3 6.3.1 | NNERPP conference materials | 7/5/2022 |
| 6.3 6.3.2 | NNERPP conference summary | 8/3/2022 |
| 6.3 6.3.3 | Teacher diversity webinar proposal | 12/14/2022 |
| 6.3 6.3.4 | Teacher diversity webinar agenda and materials | 2/6/2023 |
| 6.3 6.3.5 | Teacher diversity webinar summary | 3/27/2023 |
| 6.3 6.3.6.1 | Webinar Proposal: Colorado Pipeline Webinar | 1/15/2023 |
| 6.3 6.3.6.2 | Webinar Agenda and Materials: Colorado Pipeline Webinar | 3/8/2023 |
| 6.3 6.3.6.3 | Webinar Summary: Colorado Pipeline Webinar | 4/19/2023 |

| | | |
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| 6.3 6.3.7.1 | Webinar Proposal: Webinar on culture-based education, evidence-based professional learning, and teacher experiences designing and piloting the modules | 10/31/2023 |
| 6.3 6.3.7.2 | Webinar Agenda and Materials: Webinar on culture-based education, evidence-based professional learning, and teacher experiences designing and piloting the modules | 12/8/2023 |
| 6.3 6.3.8.1 | Conference Proposal: KS CTE Proposal | 11/10/2023 |
| 6.3 6.3.8.2 | KS CTE Conference Materials | 1/22/2024 |
| 6.4 6.4.1.1 | Draft newsletter (Summer 2022) | 6/3/2022 |
| 6.4 6.4.1.2 | Disseminate Final Newsletter (Summer 2022) | 6/30/2022 |
| 6.4 6.4.2.1 | Draft newsletter (Fall 2022) | 9/2/2022 |
| 6.4 6.4.3.1 | Draft Newsletter (Winter 2022) | 11/18/2022 |
| 6.4 6.4.3.2 | Final Newsletter (Winter 2022) | 12/30/2022 |
| 6.4 6.4.4.1 | Draft Newsletter (Spring 2023) | 3/3/2023 |
| 6.4 6.4.4.2 | Final Newsletter (Spring 2023) | 3/31/2023 |
| 6.4 6.4.5.1 | Draft Summer Newsletter 2023 | 6/1/2023 |
| 6.4 6.4.5.2 | Final Summer Newsletter 2023 | 6/30/2023 |
| 6.4 6.4.6.1 | Draft Fall Newsletter | 9/1/2023 |
| 6.4 6.4.6.2 | Final Fall Newsletter 2023 | 9/29/2023 |
| 6.4 6.4.7.1 | Draft Winter Newsletter 2023 | 12/1/2023 |
| 6.4 6.4.7.2 | Final Winter Newsletter 2023 | 12/29/2023 |
| 6.4 6.4.8 | Spring 2024 Newsletter | 3/1/2024 |
| 6.4 6.4.9 | Summer 2024 Newsletter | 5/31/2024 |
| 6.4 6.4.10 | Fall 2024 Newsletter | 9/6/2024 |
| 6.4 6.4.11 | Winter 2024 Newsletter | 12/6/2024 |
| 6.5 6.5.1.1 | Blog 1 | 7/29/2022 |
| 6.5 6.5.1.2 | Blog 2 | 8/24/2022 |
| 6.5 6.5.1.3 | Blog 3 | 10/10/2022 |
| 6.5 6.5.1.4 | Blog 4 | 12/14/2022 |
| 6.5 6.5.1.5 | Blog 5 (DPS) | 4/28/2023 |
| 6.5 6.5.1.6 | Blog 6 (South Dakota Highlight) | 8/31/2023 |
| 6.5 6.5.1.7 | Blog 7 (Wyoming Highlight) | 10/31/2023 |
| 6.5 6.5.1.8 | Blog 8 | 12/29/2023 |
| 6.5 6.5.1.9 | Blog 9 | 7/31/2024 |
| 6.5 6.5.1.10 | Blog 10 | 7/31/2024 |
| 6.5 6.5.1.11 | Blog 11 | 12/27/2024 |
| 6.5 6.5.1.12 | Blog 12 | 12/27/2024 |
| 6.6 6.6.1.01 | Social media posts | 3/31/2022 |
| 6.6 6.6.1.02 | Social media posts | 4/29/2022 |
| 6.6 6.6.1.03 | Social media posts | 5/31/2022 |
| 6.6 6.6.1.04 | Social media posts | 6/30/2022 |
| 6.6 6.6.1.05 | Social media posts | 7/31/2022 |
| 6.6 6.6.1.06 | Social media posts | 8/31/2022 |
| 6.6 6.6.1.07 | Social media posts | 9/30/2022 |
| 6.6 6.6.1.08 | Social media posts | 10/28/2022 |
| 6.6 6.6.1.09 | Social media posts | 11/30/2022 |
| 6.6 6.6.1.10 | Social media posts | 12/30/2022 |
| 6.6 6.6.1.11 | Social media posts | 1/31/2023 |
| 6.6 6.6.1.12 | Social media posts | 2/28/2023 |
| 6.6 6.6.1.13 | Social media posts | 3/31/2023 |
| 6.6 6.6.1.14 | Social media posts | 4/28/2023 |
| 6.6 6.6.1.15 | Social media posts | 5/31/2023 |
| 6.6 6.6.1.16 | Social media posts | 6/30/2023 |
| 6.6 6.6.1.17 | Social media posts | 7/31/2023 |
| 6.6 6.6.1.18 | Social media posts | 8/31/2023 |
| 6.6 6.6.1.19 | Social media posts | 9/29/2023 |
| 6.6 6.6.1.20 | Social media posts | 10/31/2023 |
| 6.6 6.6.1.21 | Social media posts | 11/30/2023 |
| 6.6 6.6.1.22 | Social media posts | 12/29/2023 |
| 6.6 6.6.1.23 | Social media posts | 1/31/2024 |
| 6.6 6.6.1.24 | Social media posts | 2/29/2024 |
| 6.6 6.6.1.25 | Social media posts | 3/29/2024 |
| 6.6 6.6.1.26 | Social media posts | 4/30/2024 |
| 6.6 6.6.1.27 | Social media posts | 5/31/2024 |
| 6.6 6.6.1.28 | Social media posts | 6/28/2024 |
| 6.6 6.6.1.29 | Social media posts | 7/31/2024 |
| 6.6 6.6.1.30 | Social media posts | 8/30/2024 |
| 6.6 6.6.1.31 | Social media posts | 9/30/2024 |
| 6.6 6.6.1.32 | Social media posts | 10/31/2024 |

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|--------------|----------------------|------------|
| 6.6 6.6.1.33 | Social media posts | 11/29/2024 |
| 6.6 6.6.1.34 | Social media posts | 12/31/2024 |
| 6.7 6.7.1 | Templates | 6/1/2022 |
| 6.7 6.7.2.1 | REL Central brochure | 9/30/2022 |



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF FINANCE AND OPERATIONS
OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

Memo to File: Contract 91990022C0015 - REL Central P00007

| | |
|--------------------------------------|--|
| Contract Number: | 91990022C0015 - REL Central |
| Period of Performance: | January 3, 2022, through January 2, 2027 |
| Acquisition Plan Tracking Number: | 642 |
| NAICS Code: | 611710: Educational Support Services |
| Contractor: | Mathematica |
| UEI | T41EGEAK2L35 |
| Product and Service Code (PSC): | R499: Support Professional: Other |
| Service Contract Coding Declaration: | Other Function |

AUTHORITY

Modification P00007 is executed in accordance with the following contract clauses:
Clause 52.243-2 Alternate I: Changes – Cost Reimbursement

BACKGROUND

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

PURPOSE/ DESCRIPTION OF CHANGES

The purpose of this modification is the following:

- Incorporate a revised deliverable schedule

FUNDING

The total contract value is remains \$24,187,916.08.

PERIOD OF PERFORMANCE

This modification does not affect the period of performance. The period of performance remains January 3, 2022, through January 2, 2027.

SYNOPSIS

There is no requirement for synopsisizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsisized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

SCOPE OF WORK

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

RECOMMENDATION

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00007.

Recommend:



Revoked certificate

X Katie Oppen

Ms. Katie Oppen

Contract Specialist

Signed by: Office of Finance and Operations

| AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT | | 1. CONTRACT ID CODE | | PAGE OF PAGES | |
|---|--|--|--|--|----|
| | | | | 1 | 23 |
| 2. AMENDMENT/MODIFICATION NUMBER 91990022C0015P00007 | | 3. EFFECTIVE DATE AUG 01, 2024 | | 4. REQUISITION/PURCHASE REQUISITION NUMBER | |
| 5. PROJECT NUMBER (If applicable) | | 6. ISSUED BY US Department of Education 400 Maryland Avenue SW, LBJ-2C274 Washington DC 20202 | | 7. ADMINISTERED BY (If other than Item 6) See Block 6 | |
| 8. NAME AND ADDRESS OF CONTRACTOR (Number, street, county, State and ZIP Code) MATHEMATICA INC. 600 ALEXANDER PARK SUITE 100 PRINCETON NJ 08540 | | 9A. AMENDMENT OF SOLICITATION NUMBER | | 9B. DATED (SEE ITEM 11) | |
| 10A. MODIFICATION OF CONTRACT/ORDER NUMBER 91990022C0015 | | 10B. DATED (SEE ITEM 13) MAR 02, 2022 | | | |
| CODE 00000011 | | FACILITY CODE | | | |

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended. ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted;
or (c) By separate letter or electronic communication which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE
RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If
by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or electronic communication, provided each letter or electronic
communication makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)
See Schedule
Modification Amount: \$0.00
Modification Obligated Amount: \$0.00

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NUMBER AS DESCRIBED IN ITEM 14.


| CHECK ONE | A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NUMBER IN ITEM 10A. |
|-------------------------------------|---|
| <input type="checkbox"/> | |
| <input type="checkbox"/> | B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). |
| <input checked="" type="checkbox"/> | C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 Alt I: Changes - Cost Reimbursement |
| <input type="checkbox"/> | D. OTHER (Specify type of modification and authority) |

E. IMPORTANT: Contractor ☐ is not ☒ is required to sign this document and return 1 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

Please see attached

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

| | | | |
|---|-------------------------------|--|----------------------------------|
| 15A. NAME AND TITLE OF SIGNER (Type or print) Voula Colburn, Sr. Contract Specialist | | 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Joseph Gibbs, contract specialist 202-453-7716 Joseph.Gibbs@ed.gov | |
| 15B. CONTRACTOR/OFFEROR  (Signature of person authorized to sign) | 15C. DATE SIGNED 31JUL2024 | 16B. UNITED STATES OF AMERICA JOSEPH GIBBS Digitally signed by JOSEPH GIBBS Date: 2024.08.01 09:50:20 -04'00' (Signature of Contracting Officer) | 16C. DATE SIGNED AUG 01, 2024 |

Previous edition unusable

STANDARD FORM 30 (REV. 11/2016)
Prescribed by GSA FAR (48 CFR) 53.243

ED 002756

The purpose of this modification is the following:

- Incorporate a revised deliverable schedule

The total contract value is remains \$24,187,916.08.

Except as provided herein, all other terms and conditions of contract 91990022C0015 remains unchanged and in full force and effect.

Contractor's Statement of Release

In consideration of the modification agreed to herein as complete Equitable Adjustment for the updated Period of Performance, the contractor hereby releases the Government from all liability under this contract for further adjustments attributable to such facts or circumstances giving rise to this change.

SCHEDULE Continued

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| ITEM NO. | SUPPLIES/SERVICES | QUANTITY | UNIT | UNIT PRICE | AMOUNT |
|----------|---|----------|------|------------|--------|
| | <p>Contracting Officer: Joseph Gibbs, 202-453-7716, Joseph.Gibbs@ed.gov</p> <p>Primary Contracting Officer Representative: Eric Mason, 202-987-1355, eric.mason@ed.gov</p> <p>Alternate Contracting Officer Representative(s): Amy Johnson, 202-208-7849, amy.johnson@ed.gov</p> <p>Property Administrator Point of Contact: None</p> <p>Primary Technical Point of Contact: Amy Johnson, 202-208-7849, amy.johnson@ed.gov</p> <p>Alternate Technical Point(s) of Contact: None</p> | | | | |

ED 002758

SECTION J LIST OF ATTACHMENTS..... 5

J.1 Attachment B- Deliverable Schedule.....5

SECTION J
LIST OF ATTACHMENTS

J.1 Attachment B- Deliverable Schedule

REL Central Deliverables Schedule
June 2024

| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|--|-------------------|--------------------|
| 1.1 | 1.1.0 | Redacted proposal | 3/11/2022 | |
| 1.1 | 1.1.1 | Summary of REL Kickoff Meeting | 4/14/2022 | |
| 1.2 | 1.2.1.01 | Biweekly/Bimonthly call agenda (3/16/22) | 3/14/2022 | |
| 1.2 | 1.2.1.02 | Biweekly/Bimonthly call summary memo (3/16/22) | 3/23/2022 | |
| 1.2 | 1.2.1.03 | Biweekly/Bimonthly call agenda (3/29/22) | 3/25/2022 | |
| 1.2 | 1.2.1.04 | Biweekly/Bimonthly call summary memo (3/29/22) | 4/5/2022 | |
| 1.2 | 1.2.1.05 | Biweekly/Bimonthly call agenda (4/12/22) | 4/8/2022 | |
| 1.2 | 1.2.1.06 | Biweekly/Bimonthly call summary memo (4/12/22) | 4/19/2022 | |
| 1.2 | 1.2.1.07 | Biweekly/Bimonthly call agenda (4/27/22) | 4/25/2022 | |
| 1.2 | 1.2.1.08 | Biweekly/Bimonthly call summary memo (4/27/22) | 5/4/2022 | |
| 1.2 | 1.2.1.09 | Biweekly/Bimonthly call agenda (5/11/22) | 5/9/2022 | |
| 1.2 | 1.2.1.10 | Biweekly/Bimonthly call summary memo (5/11/22) | 5/18/2022 | |
| 1.2 | 1.2.1.100 | Biweekly/bimonthly call summary (1/31/2024) | 2/7/2024 | |
| 1.2 | 1.2.1.101 | Biweekly/bimonthly call agenda (2/14/2024) | 2/12/2024 | |
| 1.2 | 1.2.1.102 | Biweekly/bimonthly call summary (2/14/2024) | 2/22/2024 | |
| 1.2 | 1.2.1.103 | Biweekly/bimonthly call agenda (2/28/2024) | 2/26/2024 | |
| 1.2 | 1.2.1.104 | Biweekly/bimonthly call summary (2/28/2024) | 3/6/2024 | |
| 1.2 | 1.2.1.105 | Biweekly/bimonthly call agenda (3/13/2024) | 3/11/2024 | |
| 1.2 | 1.2.1.106 | Biweekly/bimonthly call summary (3/13/2024) | 3/20/2024 | |
| 1.2 | 1.2.1.107 | Biweekly/bimonthly call agenda (3/27/2024) | 3/25/2024 | |
| 1.2 | 1.2.1.108 | Biweekly/bimonthly call summary (3/27/2024) | 4/3/2024 | |
| 1.2 | 1.2.1.109 | Biweekly/bimonthly call agenda (4/10/2024) | 4/8/2024 | |
| 1.2 | 1.2.1.11 | Biweekly/Bimonthly call agenda (5/25/22) | 5/23/2022 | |
| 1.2 | 1.2.1.110 | Biweekly/bimonthly call summary (4/10/2024) | 4/17/2024 | |
| 1.2 | 1.2.1.111 | Biweekly/bimonthly call agenda (4/24/2024) | 4/22/2024 | |
| 1.2 | 1.2.1.112 | Biweekly/bimonthly call summary (4/24/2024) | 5/3/2024 | |
| 1.2 | 1.2.1.113 | Biweekly/bimonthly call agenda (5/8/2024) | 5/6/2024 | |
| 1.2 | 1.2.1.114 | Biweekly/bimonthly call summary (5/8/2024) | 5/15/2024 | |
| 1.2 | 1.2.1.115 | Biweekly/bimonthly call agenda (5/22/2024) | 5/20/2024 | |
| 1.2 | 1.2.1.116 | Biweekly/bimonthly call summary (5/22/2024) | 5/30/2024 | |
| 1.2 | 1.2.1.117 | Biweekly/bimonthly call agenda (6/5/2024) | 6/3/2024 | |
| 1.2 | 1.2.1.118 | Biweekly/bimonthly call summary (6/5/2024) | 6/12/2024 | |
| 1.2 | 1.2.1.119 | Biweekly/bimonthly call agenda (6/20/2024) | 6/13/2024 | |
| 1.2 | 1.2.1.12 | Biweekly/Bimonthly call summary memo (5/25/22) | 6/1/2022 | |
| 1.2 | 1.2.1.120 | Biweekly/bimonthly call summary (6/20/2024) | 6/24/2024 | |
| 1.2 | 1.2.1.121 | Biweekly/bimonthly call agenda (7/3/2024) | 7/1/2024 | |
| 1.2 | 1.2.1.122 | Biweekly/bimonthly call summary (7/3/2024) | 7/11/2024 | |
| 1.2 | 1.2.1.123 | Biweekly/bimonthly call agenda (7/17/2024) | 7/15/2024 | |
| 1.2 | 1.2.1.124 | Biweekly/bimonthly call summary (7/17/2024) | 7/24/2024 | |
| 1.2 | 1.2.1.125 | Biweekly/bimonthly call agenda (7/31/2024) | 7/29/2024 | |
| 1.2 | 1.2.1.126 | Biweekly/bimonthly call summary (7/31/2024) | 8/7/2024 | |

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REL Central Deliverables Schedule
June 2024

| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|---|-------------------|--------------------|
| 1.2 | 1.2.1.127 | Biweekly/bimonthly call agenda (8/14/2024) | 8/12/2024 | |
| 1.2 | 1.2.1.128 | Biweekly/bimonthly call summary (8/14/2024) | 8/21/2024 | |
| 1.2 | 1.2.1.129 | Biweekly/bimonthly call agenda (8/28/2024) | 8/26/2024 | |
| 1.2 | 1.2.1.13 | Biweekly/Bimonthly call agenda (6/8/22) | 6/6/2022 | |
| 1.2 | 1.2.1.130 | Biweekly/bimonthly call summary (8/28/2024) | 9/5/2024 | |
| 1.2 | 1.2.1.131 | Biweekly/bimonthly call agenda (9/11/2024) | 9/9/2024 | |
| 1.2 | 1.2.1.132 | Biweekly/bimonthly call summary (9/11/2024) | 9/18/2024 | |
| 1.2 | 1.2.1.133 | Biweekly/bimonthly call agenda (9/25/2024) | 9/23/2024 | |
| 1.2 | 1.2.1.134 | Biweekly/bimonthly call summary (9/25/2024) | 10/2/2024 | |
| 1.2 | 1.2.1.135 | Biweekly/bimonthly call agenda (10/9/2024) | 10/7/2024 | |
| 1.2 | 1.2.1.136 | Biweekly/bimonthly call summary (10/9/2024) | 10/17/2024 | |
| 1.2 | 1.2.1.137 | Biweekly/bimonthly call agenda (10/23/2024) | 10/21/2024 | |
| 1.2 | 1.2.1.138 | Biweekly/bimonthly call summary (10/23/2024) | 10/30/2024 | |
| 1.2 | 1.2.1.139 | Biweekly/bimonthly call agenda (11/6/2024) | 11/4/2024 | |
| 1.2 | 1.2.1.14 | Biweekly/Bimonthly call summary memo (6/8/22) | 6/15/2022 | |
| 1.2 | 1.2.1.140 | Biweekly/bimonthly call summary (11/6/2024) | 11/14/2024 | |
| 1.2 | 1.2.1.141 | Biweekly/bimonthly call agenda (11/20/2024) | 11/18/2024 | |
| 1.2 | 1.2.1.142 | Biweekly/bimonthly call summary (11/20/2024) | 11/27/2024 | |
| 1.2 | 1.2.1.143 | Biweekly/bimonthly call agenda (12/4/2023) | 12/2/2024 | |
| 1.2 | 1.2.1.144 | Biweekly/bimonthly call summary (12/4/2023) | 12/11/2024 | |
| 1.2 | 1.2.1.145 | Biweekly/bimonthly call agenda (12/18/2024) | 12/16/2024 | |
| 1.2 | 1.2.1.146 | Biweekly/bimonthly call summary (12/18/2024) | 12/26/2024 | |
| 1.2 | 1.2.1.147 | Biweekly/bimonthly call agenda (1/2/2025) | 12/30/2024 | |
| 1.2 | 1.2.1.15 | Biweekly/Bimonthly call agenda (6/22/22) | 6/20/2022 | |
| 1.2 | 1.2.1.16 | Biweekly/Bimonthly call summary memo (6/22/22) | 6/29/2022 | |
| 1.2 | 1.2.1.17 | Biweekly/Bimonthly call agenda (7/6/22) | 7/1/2022 | |
| 1.2 | 1.2.1.18 | Biweekly/Bimonthly call summary memo (7/6/22) | 7/13/2022 | |
| 1.2 | 1.2.1.19 | Biweekly/Bimonthly call agenda (7/20/22) | 7/18/2022 | |
| 1.2 | 1.2.1.20 | Biweekly/Bimonthly call summary memo (7/20/22) | 7/27/2022 | |
| 1.2 | 1.2.1.21 | Biweekly/Bimonthly call agenda (8/3/22) | 8/1/2022 | |
| 1.2 | 1.2.1.22 | Biweekly/Bimonthly call summary memo (8/3/22) | 8/10/2022 | |
| 1.2 | 1.2.1.23 | Biweekly/Bimonthly call agenda (8/17/22) | 8/15/2022 | |
| 1.2 | 1.2.1.24 | Biweekly/Bimonthly call summary memo (8/17/22) | 8/24/2022 | |
| 1.2 | 1.2.1.25 | Biweekly/Bimonthly call agenda (8/31/22) | 8/29/2022 | |
| 1.2 | 1.2.1.26 | Biweekly/Bimonthly call summary memo (8/31/22) | 9/7/2022 | |
| 1.2 | 1.2.1.27 | Biweekly/Bimonthly call agenda (9/14/22) | 9/12/2022 | |
| 1.2 | 1.2.1.28 | Biweekly/Bimonthly call summary memo (9/14/22) | 9/21/2022 | |
| 1.2 | 1.2.1.29 | Biweekly/Bimonthly call agenda (9/28/22) | 9/26/2022 | |
| 1.2 | 1.2.1.30 | Biweekly/Bimonthly call summary memo (9/28/22) | 10/5/2022 | |
| 1.2 | 1.2.1.31 | Biweekly/Bimonthly call agenda (10/12/22) | 10/10/2022 | |
| 1.2 | 1.2.1.32 | Biweekly/Bimonthly call summary memo (10/12/22) | 10/19/2022 | |

REL Central Deliverables Schedule
June 2024

| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|---|-------------------|--------------------|
| 1.2 | 1.2.1.33 | Biweekly/Bimonthly call agenda (10/26/22) | 10/24/2022 | |
| 1.2 | 1.2.1.34 | Biweekly/Bimonthly call summary memo (10/26/22) | 11/2/2022 | |
| 1.2 | 1.2.1.35 | Biweekly/Bimonthly call agenda (11/9/22) | 11/7/2022 | |
| 1.2 | 1.2.1.36 | Biweekly/Bimonthly call summary memo (11/9/22) | 11/16/2022 | |
| 1.2 | 1.2.1.37 | Biweekly/Bimonthly call agenda (11/23/22) | 11/21/2022 | |
| 1.2 | 1.2.1.38 | Biweekly/Bimonthly call summary memo (11/23/22) | 11/30/2022 | |
| 1.2 | 1.2.1.39 | Biweekly/Bimonthly call agenda (12/7/22) | 12/5/2022 | |
| 1.2 | 1.2.1.40 | Biweekly/Bimonthly call summary memo (12/7/22) | 12/14/2022 | |
| 1.2 | 1.2.1.41 | Biweekly/Bimonthly call agenda (12/21/22) | 12/19/2022 | |
| 1.2 | 1.2.1.42 | Biweekly/Bimonthly call summary memo (12/21/22) | 12/28/2022 | |
| 1.2 | 1.2.1.43 | Biweekly/Bimonthly call agenda (1/4/23) | 1/2/2023 | |
| 1.2 | 1.2.1.44 | Biweekly/Bimonthly summary memo (1/4/23) | 1/11/2023 | |
| 1.2 | 1.2.1.45 | Biweekly/Bimonthly call agenda (1/18/23) | 1/16/2023 | |
| 1.2 | 1.2.1.46 | Biweekly/Bimonthly summary memo (1/18/23) | 1/25/2023 | |
| 1.2 | 1.2.1.47 | Biweekly/Bimonthly call agenda (2/1/23) | 1/30/2023 | |
| 1.2 | 1.2.1.48 | Biweekly/Bimonthly summary memo (2/1/23) | 2/8/2023 | |
| 1.2 | 1.2.1.49 | Biweekly/Bimonthly call agenda (2/15/23) | 2/13/2023 | |
| 1.2 | 1.2.1.50 | Biweekly/Bimonthly summary memo (2/15/2023) | 2/22/2023 | |
| 1.2 | 1.2.1.51 | Biweekly/Bimonthly call agenda (3/1/23) | 2/27/2023 | |
| 1.2 | 1.2.1.52 | Biweekly/Bimonthly summary memo (3/1/23) | 3/8/2023 | |
| 1.2 | 1.2.1.53 | Biweekly/Bimonthly call agenda (3/15/2023) | 3/13/2023 | |
| 1.2 | 1.2.1.54 | Biweekly/Bimonthly summary memo (3/15/2023) | 3/22/2023 | |
| 1.2 | 1.2.1.55 | Biweekly/Bimonthly call agenda (3/29/2023) | 3/27/2023 | |
| 1.2 | 1.2.1.56 | Biweekly/Bimonthly Summary Memo (3/29/2023) | 4/5/2023 | |
| 1.2 | 1.2.1.57 | Biweekly/Bimonthly Call Agenda (4/12/23) | 4/10/2023 | |
| 1.2 | 1.2.1.58 | Biweekly/Bimonthly summary memo (4/12/2023) | 4/19/2023 | |
| 1.2 | 1.2.1.59 | Biweekly/Bimonthly Call Agenda (5/1/23) | 4/26/2023 | |
| 1.2 | 1.2.1.60 | Biweekly/Bimonthly summary memo (5/1/2023) | 5/8/2023 | |
| 1.2 | 1.2.1.61 | Biweekly/Bimonthly call agenda (5/10/23) | 5/8/2023 | |
| 1.2 | 1.2.1.62 | Biweekly/Bimonthly summary memo | 5/17/2023 | |
| 1.2 | 1.2.1.63 | Biweekly/bimonthly call agenda (5/24/23) | 5/22/2023 | |
| 1.2 | 1.2.1.64 | Biweekly/bimonthly summary memo (5/24/23) | 5/31/2023 | |
| 1.2 | 1.2.1.65 | Biweekly/Bimonthly call agenda (6/7/23) | 6/5/2023 | |
| 1.2 | 1.2.1.66 | Biweekly/Bimonthly summary memo (6/7/23) | 6/14/2023 | |
| 1.2 | 1.2.1.67 | Biweekly/Bimonthly call agenda (6/21/23) | 6/19/2023 | |
| 1.2 | 1.2.1.68 | Biweekly/Bimonthly summary memo (6/21/23) | 6/28/2023 | |
| 1.2 | 1.2.1.69 | Biweekly/Bimonthly call agenda (7/5/23) | 7/3/2023 | |
| 1.2 | 1.2.1.70 | Biweekly/Bimonthly summary memo (7/5/23) | 7/12/2023 | |
| 1.2 | 1.2.1.71 | Biweekly/Bimonthly call agenda (7/19/2023) | 7/17/2023 | |
| 1.2 | 1.2.1.72 | Biweekly/Bimonthly summary memo (7/19/23) | 7/26/2023 | |
| 1.2 | 1.2.1.73 | Biweekly/Bimonthly call agenda (8/4/23) | 8/2/2023 | |

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|---------|--------------------|---|-------------------|--------------------|
| 1.2 | 1.2.1.74 | Biweekly/Bimonthly summary memo (8/2/23) | 8/11/2023 | |
| 1.2 | 1.2.1.75 | Biweekly/Bimonthly call agenda (8/16/23) | 8/14/2023 | |
| 1.2 | 1.2.1.76 | Biweekly/Bimonthly summary memo (8/16/2023) | 8/23/2023 | |
| 1.2 | 1.2.1.77 | Biweekly/Bimonthly call agenda (8/30/23) | 8/28/2023 | |
| 1.2 | 1.2.1.78 | Biweekly/Bimonthly summary memo (8/30/23) | 9/6/2023 | |
| 1.2 | 1.2.1.79 | Biweekly/Bimonthly call agenda (9/13/2023) | 9/11/2023 | |
| 1.2 | 1.2.1.80 | Biweekly/Bimonthly summary memo (9/13/2023) | 9/20/2023 | |
| 1.2 | 1.2.1.81 | Biweekly/Bimonthly call agenda (9/27/23) | 9/25/2023 | |
| 1.2 | 1.2.1.82 | Biweekly/Bimonthly summary memo (9/27/23) | 10/4/2023 | |
| 1.2 | 1.2.1.83 | Biweekly/Bimonthly Call agenda (10/11/23) | 10/9/2023 | |
| 1.2 | 1.2.1.84 | Biweekly/Bimonthly summary memo (10/11/23) | 10/18/2023 | |
| 1.2 | 1.2.1.85 | Biweekly/Bimonthly call agenda (10/25/2023) | 10/23/2023 | |
| 1.2 | 1.2.1.86 | Biweekly/Bimonthly summary memo (10/25/2023) | 11/1/2023 | |
| 1.2 | 1.2.1.87 | Biweekly/bimonthly call agenda (11/8/23) | 11/9/2023 | |
| 1.2 | 1.2.1.88 | Biweekly/bimonthly summary memo (11/8/2023) | 11/20/2023 | |
| 1.2 | 1.2.1.89 | Biweekly/Bimonthly call agenda (11/22/23) | 11/16/2023 | |
| 1.2 | 1.2.1.90 | Biweekly/Bimonthly summary memo (11/22/23) | 11/28/2023 | |
| 1.2 | 1.2.1.91 | Biweekly/Bimonthly call agenda (12/12/23) | 12/8/2023 | |
| 1.2 | 1.2.1.92 | Biweekly/Bimonthly summary memo (12/12/23) | 12/19/2023 | |
| 1.2 | 1.2.1.93 | Biweekly/Bimonthly call agenda (12/20/23) | 12/18/2023 | |
| 1.2 | 1.2.1.94 | Biweekly/Bimonthly summary memo (12/20/2023) | 12/27/2023 | |
| 1.2 | 1.2.1.95 | Biweekly/bimonthly call agenda (1/3/24) | 12/29/2023 | |
| 1.2 | 1.2.1.96 | Biweekly/bimonthly call summary (1/3/24) | 1/10/2024 | |
| 1.2 | 1.2.1.97 | Biweekly/bimonthly call agenda (1/17/2024) | 1/12/2024 | |
| 1.2 | 1.2.1.98 | Biweekly/bimonthly call summary (1/17/2024) | 1/24/2024 | |
| 1.2 | 1.2.1.99 | Biweekly/bimonthly call agenda (1/31/2024) | 1/29/2024 | |
| 1.4 | 1.4.1.1 | Department presentation briefing materials | 12/29/2023 | |
| 1.4 | 1.4.1.2 | Department presentation summary | 12/29/2023 | |
| 1.4 | 1.4.2 | Mid-point meeting slides | 5/13/2024 | |
| 1.5 | 1.5.0 | Report on the establishment of the Governing Board | 4/5/2022 | |
| 1.5 | 1.5.1.1 | Draft meeting agenda and materials for Governing Board meeting (Spring | 7/15/2022 | |
| 1.5 | 1.5.1.2 | Final meeting agendas and materials for Governing Board Meeting (Spring | 7/29/2022 | |
| 1.5 | 1.5.1.3 | Governing Board meeting summary to IES (Spring 2022) | 8/19/2022 | |
| 1.5 | 1.5.2.1 | Draft meeting agenda and materials for Governing Board meeting (Fall | 10/19/2022 | |
| 1.5 | 1.5.2.2 | Final meeting agendas and materials for Governing Board Meeting (Fall | 11/2/2022 | |
| 1.5 | 1.5.2.3 | Governing Board meeting summary to IES (Fall 2022) | 11/23/2022 | |
| 1.5 | 1.5.3.1 | Draft meeting agenda and materials for Governing Board meeting (Spring | 4/21/2023 | |
| 1.5 | 1.5.3.2 | Final meeting agenda and materials for Governing Board meeting (Spring | 5/5/2023 | |
| 1.5 | 1.5.3.3 | Governing Board meeting summary to IES (Spring 2023) | 5/26/2023 | |
| 1.5 | 1.5.3.4 | CARS Actuals | 7/26/2023 | |
| 1.5 | 1.5.4.1 | Draft meeting agenda and materials for Governing Board meeting | 10/5/2023 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|---|-------------------|---|
| 1.5 | 1.5.4.2 | Final meeting agenda and materials for Governing Board meeting (Fall) | 10/19/2023 | |
| 1.5 | 1.5.4.3 | Governing Board meeting summary to IES (Fall 2023) | 12/29/2023 | |
| 1.5 | 1.5.5.1 | Meeting Agenda and Materials (Spring 2024) | 4/26/2024 | |
| 1.5 | 1.5.5.2 | Meeting Summary (Spring 2024) | 5/24/2024 | |
| 1.5 | 1.5.6.1 | Meeting agenda and Materials (Fall 2024) | 7/18/2024 | Updated due date-meeting scheduled for August 8 |
| 1.5 | 1.5.6.2 | Meeting Summary (Fall 2024) | 8/22/2024 | Updated due date-meeting scheduled for August 8 |
| 1.6 | 1.6.1.1 | Bi-annual Assessment of Progress Report (Draft) | 6/30/2022 | |
| 1.6 | 1.6.1.2 | Bi-annual Assessment of Progress Report (Final) | 6/30/2022 | |
| 1.6 | 1.6.2.1 | Bi-annual Assessment of Progress Report (Draft) | 12/1/2022 | |
| 1.6 | 1.6.2.2 | Bi-annual Assessment of Progress Report (Final) | 1/5/2023 | |
| 1.6 | 1.6.3.1 | Bi-Annual Assessment of Progress Report (Draft) | 6/1/2023 | |
| 1.6 | 1.6.3.2 | Bi-Annual Assessment of Progress Report (Final) | 7/3/2023 | |
| 1.6 | 1.6.4.1 | Bi-Annual Assessment of Progress Report (Draft) | 12/1/2023 | |
| 1.6 | 1.6.4.2 | Bi-Annual Assessment of Progress Report (Final) | 1/10/2024 | |
| 1.6 | 1.6.5 | Bi-annual Assessment of Progress Report | 6/3/2024 | |
| 1.6 | 1.6.6 | Bi-annual Assessment of Progress Report | 12/2/2024 | |
| 1.7 | 1.7.01 | Monthly Progress Report | 4/14/2022 | |
| 1.7 | 1.7.02 | Monthly Progress Report | 5/13/2022 | |
| 1.7 | 1.7.03 | Monthly Progress Report | 6/14/2022 | |
| 1.7 | 1.7.04 | Monthly Progress Report | 7/15/2022 | |
| 1.7 | 1.7.05 | Monthly Progress Report | 8/12/2022 | |
| 1.7 | 1.7.06 | Monthly Progress Report | 9/15/2022 | |
| 1.7 | 1.7.07 | Monthly Progress Report | 10/17/2022 | |
| 1.7 | 1.7.08 | Monthly Progress Report | 11/15/2022 | |
| 1.7 | 1.7.09 | Monthly Progress Report | 12/14/2022 | |
| 1.7 | 1.7.10 | Monthly Progress Report | 1/13/2023 | |
| 1.7 | 1.7.11 | Monthly Progress Report | 2/14/2023 | |
| 1.7 | 1.7.12 | Monthly Progress Report | 3/14/2023 | |
| 1.7 | 1.7.13 | Monthly Progress Report | 4/14/2023 | |
| 1.7 | 1.7.14 | Monthly Progress Report | 5/12/2023 | |
| 1.7 | 1.7.15 | Monthly Progress Report | 6/14/2023 | |
| 1.7 | 1.7.16 | Monthly Progress Report | 7/17/2023 | |
| 1.7 | 1.7.17 | Monthly Progress Report | 8/14/2023 | |
| 1.7 | 1.7.18 | Monthly Progress Report | 9/15/2023 | |
| 1.7 | 1.7.19 | Monthly Progress Report | 10/13/2023 | |
| 1.7 | 1.7.20 | Monthly Progress Report | 11/14/2023 | |
| 1.7 | 1.7.21 | Monthly Progress Report | 12/14/2023 | |
| 1.7 | 1.7.22 | Monthly Progress Report | 1/16/2024 | |
| 1.7 | 1.7.23 | Monthly Progress Report | 2/14/2024 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|--|-------------------|---|
| 1.7 | 1.7.24 | Monthly Progress Report | 3/14/2024 | |
| 1.7 | 1.7.25 | Monthly Progress Report | 4/12/2024 | |
| 1.7 | 1.7.26 | Monthly Progress Report | 5/14/2024 | |
| 1.7 | 1.7.27 | Monthly Progress Report | 6/14/2024 | |
| 1.7 | 1.7.28 | Monthly Progress Report | 7/15/2024 | |
| 1.7 | 1.7.29 | Monthly Progress Report | 8/14/2024 | |
| 1.7 | 1.7.30 | Monthly Progress Report | 9/16/2024 | |
| 1.7 | 1.7.31 | Monthly Progress Report | 10/15/2024 | |
| 1.7 | 1.7.32 | Monthly Progress Report | 11/15/2024 | |
| 1.7 | 1.7.33 | Monthly Progress Report | 12/13/2024 | |
| 1.8 | 1.8.1 | Performance reporting | 6/28/2022 | |
| 1.8 | 1.8.10 | Quarterly Performance Reporting (2024 Q4) | 9/30/2024 | |
| 1.8 | 1.8.11 | Quarterly Performance Reporting (2025 Q1) | 1/17/2025 | |
| 1.8 | 1.8.2 | Quarterly Performance Reporting (2022 Q4) | 9/28/2022 | |
| 1.8 | 1.8.3 | Quarterly Performance Reporting (2023 Q1) | 1/9/2023 | |
| 1.8 | 1.8.4 | Quarterly Performance Reporting (2023 Q2) | 3/27/2023 | |
| 1.8 | 1.8.5 | Quarterly Performance Reporting (2023 Q3) | 6/28/2023 | |
| 1.8 | 1.8.6 | Quarterly Performance Reporting (2023 Q4) | 9/28/2023 | |
| 1.8 | 1.8.7 | Quarterly Performance Reporting (2024 Q1) | 1/10/2024 | |
| 1.8 | 1.8.8 | Quarterly Performance Reporting (2024 Q2) | 3/29/2024 | |
| 1.8 | 1.8.9 | Quarterly Performance Reporting (2024 Q3) | 7/31/2024 | Updated due date since we have not received request from IES yet. |
| 1.9 | 1.9.1 | Submission of security documents for low- and moderate-level clearances | 3/15/2022 | |
| 1.9 | 1.9.2.1 | Quarterly Cybersecurity Training | 6/1/2022 | |
| 1.9 | 1.9.2.2 | Quarterly Cybersecurity Training | 9/7/2022 | |
| 1.9 | 1.9.2.3 | Cybersecurity Training | 2/13/2023 | |
| 1.9 | 1.9.2.4 | Quarterly Cybersecurity Training | 5/15/2023 | |
| 1.9 | 1.9.2.5 | Quarterly Cybersecurity Training | 9/8/2023 | |
| 1.9 | 1.9.2.6 | Quarterly Cybersecurity Training | 2/16/2024 | |
| 1.9 | 1.9.2.7 | Quarterly Cybersecurity Training (2024 course 2) | 5/17/2024 | |
| 1.9 | 1.9.3.1 | 2022 IMR Training | 12/30/2022 | |
| | 1.9.3.2 | 2024 IMR Training | 1/2/2024 | |
| 2.1 | 2.1.0 | REL Planned Partnerships and Projects on the Topic of Teacher Workforce | 7/8/2022 | |
| 2.1 | 2.1.1.1 | Cross-REL meeting agenda and materials | 8/31/2022 | |
| 2.1 | 2.1.1.2 | Cross-REL meeting summary | 9/28/2022 | |
| 2.1 | 2.1.10.1 | Quarterly cross-REL meeting agenda and materials, Q4 | 11/15/2024 | |
| 2.1 | 2.1.10.2 | Quarterly cross-REL meeting summary, Q4 | 12/13/2024 | |
| | | Proposal for cross-REL product highlighting work across the program around teacher workforce | 9/20/2024 | |
| 2.1 | 2.1.11.2 | Materials of cross-REL product highlighting work across the program around teacher workforce | 10/25/2024 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|--|-------------------|--------------------|
| 2.1 | 2.1.2.1 | Teacher workforce leadership area meeting 2 agenda and materials | 11/16/2022 | |
| 2.1 | 2.1.2.2 | Teacher workforce meeting 2 summary | 11/16/2022 | |
| 2.1 | 2.1.3.1 | Cross-REL meeting agenda and materials, quarterly | 3/1/2023 | |
| 2.1 | 2.1.3.2 | Cross-REL meeting summary, quarterly | 3/31/2023 | |
| 2.1 | 2.1.3.3 | Teacher Workforce Community of Practice Infographic Proposal | 8/31/2023 | |
| 2.1 | 2.1.3.4 | Teacher Workforce Community of Practice Infographic | 12/29/2023 | |
| 2.1 | 2.1.4.1 | Cross-REL Meeting agenda and materials, quarterly | 5/23/2023 | |
| 2.1 | 2.1.4.2 | Cross-REL Meeting summary, quarterly | 6/20/2023 | |
| 2.1 | 2.1.5.1 | Cross-REL meeting agenda and materials, quarterly | 9/30/2023 | |
| 2.1 | 2.1.5.2 | Cross-REL meeting summary, quarterly | 11/7/2023 | |
| 2.1 | 2.1.6.1 | Cross-REL meeting agenda and materials, quarterly | 1/17/2024 | |
| 2.1 | 2.1.6.2 | Cross-REL Meeting summary, quarterly | 2/14/2024 | |
| 2.1 | 2.1.7.1 | Quarterly cross-REL meeting agenda and materials, Q1 | 4/9/2024 | |
| 2.1 | 2.1.7.2 | Quarterly cross-REL meeting summary, Q1 | 5/7/2024 | |
| 2.1 | 2.1.8.1 | Quarterly cross-REL meeting agenda and materials, Q2 | 6/14/2024 | |
| 2.1 | 2.1.8.2 | Quarterly cross-REL meeting summary, Q2 | 7/12/2024 | |
| 2.1 | 2.1.9.1 | Quarterly cross-REL meeting agenda and materials, Q3 | 9/16/2024 | |
| 2.1 | 2.1.9.2 | Quarterly cross-REL meeting summary, Q3 | 10/11/2024 | |
| 2.2 | 2.2.1.1 | AERA toolkit poster session proposal | 7/12/2024 | |
| 2.3 | 2.3.1 | Signed letter(s) of intent with each regional Comprehensive Center in REL | 5/30/2022 | |
| 2.3 | 2.3.2.1 | Joint needs sensing summary memo | 3/31/2023 | |
| 2.3 | 2.3.2.2 | Joint needs sensing summary memo | 3/29/2024 | |
| 3.1 | 3.1.1 | Partnership Proposal: DPS Identifying promising approaches for student-centered math instruction | 6/30/2022 | |
| | 3.1.1.10 | Nebraska LPS equitable access to and success in honors courses partnership | 4/5/2024 | |
| 3.1 | 3.1.2 | Partnership proposal: Strengthening culture-based education in Standing | 6/1/2022 | |
| 3.1 | 3.1.3 | Partnership proposal: Teacher diversity in Colorado | 8/31/2022 | |
| 3.1 | 3.1.4 | Partnership proposal: Supporting postsecondary and workforce readiness of students in Kansas | 7/15/2022 | |
| 3.1 | 3.1.5 | Partnership proposal: Teacher retention in Missouri | 7/29/2022 | |
| 3.1 | 3.1.6 | Partnership Proposal: Mitigating teacher shortages in Wyoming | 8/31/2022 | |
| 3.1 | 3.1.7 | Partnership proposal: Accelerating math achievement in North Dakota | 9/16/2022 | |
| 3.1 | 3.1.8 | Partnership proposal: Supporting elementary readers in Nebraska | 7/31/2024 | |
| 3.1 | 3.1.9 | Partnership proposal: South Dakota on Human Capital Development in Educator Workforce to Alleviate Teacher Shortages partnership | 2/28/2023 | |
| 3.2 | 3.2.1.1 | DPS Strengthening Student Pathways to Success in 9th Grade Math Partnership Meeting Materials | 6/14/2024 | |
| 3.2 | 3.2.10.2 | 2023 Partnership Stakeholder Feedback Survey Item Selection | 9/29/2023 | |
| 3.2 | 3.2.10.3 | 2023 Annual Partnership Stakeholder Feedback Survey Responses | 11/30/2023 | |
| 3.2 | 3.2.10.4 | 2024 Annual Partnership Stakeholder Feedback Survey Responses | 11/29/2024 | |

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|---------|--------------------|---|-------------------|--------------------|
| 3.2 | 3.2.2.1 | Quarterly partnership meeting agenda and materials: Strengthening culture-based math education in Standing Rock | 10/31/2022 | |
| 3.2 | 3.2.2.2 | Standing Rock Strengthening Culture-Based Math Education Partnership Meeting Materials | 9/30/2024 | |
| 3.2 | 3.2.3.1 | Colorado Teacher Diversity Partnership Meeting Materials | 6/14/2024 | |
| 3.2 | 3.2.4.1 | Kansas Supporting postsecondary and workforce readiness of students partnership meeting materials | 6/14/2024 | |
| 3.2 | 3.2.5.1 | Missouri Teacher Retention Partnership Meeting Materials | 6/14/2024 | |
| 3.2 | 3.2.6.1 | Wyoming Mitigating Teacher Shortages Partnership Meeting Materials | 9/30/2024 | |
| 3.2 | 3.2.7.1 | North Dakota Accelerating Math Achievement Meeting Materials | 6/14/2024 | |
| 3.2 | 3.2.9.1 | South Dakota Strengthening Teacher Pipeline Partnership Meeting | 6/14/2024 | |
| 3.3 | 3.3.1 | Partnership Proposal: Math Community of Practice | 6/14/2024 | |
| 3.3 | 3.3.1.1 | Math CoP Meeting 1 materials | 10/31/2024 | |
| 3.3 | 3.3.1.2 | Math CoP Meeting 2 materials | 12/20/2024 | |
| 4.1 | 4.1.10.1 | NDE Foundational literacy concept paper | 1/19/2024 | |
| 4.1 | 4.1.10.2 | NDE Foundational literacy project proposal | 7/31/2024 | |
| 4.1 | 4.1.12.1 | North Dakota Evidence-based strategies for Differentiated instruction and blended learning concept paper | 8/31/2022 | |
| 4.1 | 4.1.12.10 | Communities of Practice Coaching Session 1 Materials | 9/29/2023 | |
| 4.1 | 4.1.12.11 | Community of Practice and Continuous Improvement Session 4 Materials | 2/13/2024 | |
| 4.1 | 4.1.12.12 | Communities of Practice and Continuous Improvement Session 5 Materials | 3/26/2024 | |
| 4.1 | 4.1.12.13 | Communities of Practice and Continuous Improvement Session 6 Materials | 4/30/2024 | |
| 4.1 | 4.1.12.14 | North Dakota Evidence-based strategies for differentiated instruction and blended learning project proposal, revised | 6/3/2024 | |
| 4.1 | 4.1.12.15 | Agenda for SY 24-25 deep-dive coaching session 1 | 9/30/2024 | |
| 4.1 | 4.1.12.16 | Agenda for SY 24-25 deep-dive coaching session 2 | 10/31/2024 | |
| 4.1 | 4.1.12.17 | Agenda for SY 24-25 deep-dive coaching session 3 | 11/20/2024 | |
| 4.1 | 4.1.12.18 | Agenda for SY 24-25 deep-dive coaching session 4 | 12/31/2024 | |
| 4.1 | 4.1.12.19 | Agenda for SY 24-25 deep-dive coaching session 5 | 2/28/2025 | |
| 4.1 | 4.1.12.2 | North Dakota Evidence-based strategies for differentiated instruction and blended learning project proposal | 11/30/2022 | |
| 4.1 | 4.1.12.20 | Agenda for SY 24-25 deep-dive coaching session 6 | 4/30/2025 | |
| 4.1 | 4.1.12.21 | Agenda for SY 25-26 deep-dive coaching session 1 | 10/30/2025 | |
| 4.1 | 4.1.12.22 | Agenda for SY 25-26 deep-dive coaching session 2 | 2/28/2026 | |
| 4.1 | 4.1.12.3 | North Dakota Evidence-based strategies for differentiated instruction and blended learning coaching session 1 materials | 2/28/2023 | |
| 4.1 | 4.1.12.4 | North Dakota Evidence-based strategies for differentiated instruction and blended learning coaching session 2 materials | 3/31/2023 | |
| 4.1 | 4.1.12.5 | North Dakota evidence based strategies for differentiated instruction and blended learning coaching session 3 materials | 4/28/2023 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|---|-------------------|---|
| 4.1 | 4.1.12.6 | North Dakota evidence based strategies for differentiated instruction and blended learning coaching session 4 materials | 5/31/2023 | |
| 4.1 | 4.1.12.7 | Introduction to the Community of Practice (CoP) and Continuous | 8/29/2023 | |
| 4.1 | 4.1.12.8 | Communities of Practice and Continuous Improvement Session 2 Materials | 10/31/2023 | |
| 4.1 | 4.1.12.9 | Communities of Practice and Continuous Practice Session 3 Materials | 1/2/2024 | |
| 4.1 | 4.1.13.1 | Wyoming Support for Formative Evaluation of the Teacher Apprenticeship Concept Paper | 1/31/2023 | |
| 4.1 | 4.1.13.2 | Wyoming Support for Formative Evaluation of the Teacher Apprenticeship Project Proposal | 3/31/2023 | |
| 4.1 | 4.1.13.3 | Coaching Session 1 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 5/1/2023 | |
| 4.1 | 4.1.13.4 | Coaching Session 2 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 6/8/2023 | |
| 4.1 | 4.1.13.5 | Coaching Session 3 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 9/29/2023 | |
| 4.1 | 4.1.13.6 | Coaching Session 4 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 7/31/2024 | |
| 4.1 | 4.1.13.7 | Coaching Session 5 Materials: WY Support for Formative Evaluation of the Teacher Apprenticeship | 10/31/2024 | Extended due date due to partner changes at WDE. We are confirming plans for this coaching session with partners. |
| 4.1 | 4.1.13.8 | Stakeholder Feedback Survey: WY Support for Formative Evaluation of the Teacher Apprenticeship | 11/29/2024 | Updated due date. |
| 4.1 | 4.1.14.1 | Project Concept Paper: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher | 11/10/2022 | |
| 4.1 | 4.1.14.2 | Project Proposal: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention | 1/26/2023 | |
| 4.1 | 4.1.14.3 | Technical Support Session 1 Materials: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 4/11/2023 | |
| 4.1 | 4.1.14.4 | Technical Support Session 2 Materials: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts. | 6/16/2023 | |
| 4.1 | 4.1.14.5 | Materials for Additional Support Session to provide guidance: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 12/29/2023 | |
| 4.1 | 4.1.14.6 | Technical Support Session 3 Materials: MO Technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 12/29/2023 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|----------------|---------------------|---|----------------------|---|
| 4.1 | 4.1.14.7 | Technical Support Session 4 Materials: MO technical support to help Ritenour School District monitor working conditions more effectively to inform teacher retention efforts | 4/30/2024 | |
| 4.1 | 4.1.14.8 | Stakeholder Feedback Survey: MO technical support to help Ritenour School District monitor working conditions more effectively to inform | 7/31/2024 | |
| 4.1 | 4.1.14.9 | Phase 2 Project Proposal: MO Ritenour Technical support | 9/30/2024 | |
| 4.1 | 4.1.16.1 | Concept Paper: CO Factors Data Collection | 12/7/2022 | |
| 4.1 | 4.1.16.2 | Project Proposal: CO Factors Data Collection | 2/24/2023 | |
| 4.1 | 4.1.16.3 | Coaching Session 1 Materials: CO Factors Data Collection | 3/31/2023 | |
| 4.1 | 4.1.16.4 | Coaching Session 2 Materials: CO Factors Data Collection | 7/26/2023 | |
| 4.1 | 4.1.16.5 | Coaching Session 3 Materials: CO Factors Data Collection | 9/29/2023 | |
| 4.1 | 4.1.16.6 | Stakeholder Feedback Survey: CO Factors Data Collection | 12/29/2023 | |
| 4.1 | 4.1.16.7 | Survey analysis guidance | 1/18/2024 | |
| 4.1 | 4.1.16.8 | CO Teacher diversity project proposal- Phase 2 | 8/30/2024 | |
| 4.1 | 4.1.17.1 | Concept Paper: DPS Better Understanding students' perceptions of their experience in the grade 9 math classroom, highlighting those that facilitate or inhibit their success | 11/4/2022 | |
| 4.1 | 4.1.17.2 | Project Proposal: DPS Better understanding students' perceptions of their experience in the grade 9 math classroom, highlighting those that facilitate or inhibit their success | 4/28/2023 | |
| 4.1 | 4.1.17.7 | SFS Responses: Strengthening student pathways to success in 9th grade math in Denver Public Schools | 7/29/2024 | |
| 4.1 | 4.1.17.8 | DPS grade 9 math classroom discourse coaching session 1 materials | 11/21/2023 | |
| 4.1 | 4.1.17.9 | Technical support to develop and pilot an instrument to measure classroom discourse in the grade 9 math - Session 1 Materials | 2/9/2023 | |
| 4.1 | 4.1.17.9 | Technical support to develop and pilot an instrument to measure classroom discourse in the grade 9 math - Session 2 Materials | 2/9/2024 | |
| 4.1 | 4.1.18.1 | 4.1.18 WY Micro-Credentials Concept Paper | 12/29/2023 | |
| 4.1 | 4.1.18.1 | 4.1.18 WY Micro-Credentials Proposal | 6/30/2024 | Dropping this deliverable. Project cancelled. |
| 4.1 | 4.1.19.1 | CO Reduced calendar year project concept paper | 4/11/2024 | |
| 4.1 | 4.1.19.2 | CO Reduced calendar year project proposal | 6/28/2024 | |
| 4.1 | 4.1.2.1 | Project concept paper: Standing Rock Developing culture-based math modules and professional learning | 7/15/2022 | |
| 4.1 | 4.1.2.10 | Standing Rock Developing culture-based math Phase 2 Resource Guide | 9/30/2024 | |
| 4.1 | 4.1.2.11 | Standing Rock Developing Culture-Based Math Modules: Partnership-Specific Newsletter | 12/29/2023 | |
| 4.1 | 4.1.2.12 | Standing Rock Developing Culture-Based Math Modules: Support for Summer 2024 Professional Learning Efforts Coaching materials | 7/12/2024 | |
| 4.1 | 4.1.2.13 | Standing Rock Developing Culture-Based Math-Modules: Support for Fall 2024 Professional Learning Efforts Coaching Materials | 12/30/2024 | |

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REL Central Deliverables Schedule
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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|--|-------------------|--------------------|
| 4.1 | 4.1.2.14 | Stakeholder Feedback Survey: SR Developing Culture-Based Math Modules | 12/30/2024 | |
| 4.1 | 4.1.2.2 | Project proposal: Standing Rock Developing culture-based math modules and professional learning | 9/28/2022 | |
| 4.1 | 4.1.2.3 | Standing Rock Developing culture-based math modules and professional coaching session 1 materials | 1/6/2023 | |
| 4.1 | 4.1.2.4 | Standing Rock Developing culture-based math modules and professional coaching session 2 materials | 4/28/2023 | |
| 4.1 | 4.1.2.5 | Standing Rock Developing culture-based math modules and professional coaching session 3 materials | 9/29/2023 | |
| 4.1 | 4.1.2.6 | Standing Rock Developing culture-based math modules and professional coaching session 4 materials | 12/29/2023 | |
| 4.1 | 4.1.2.7 | Standing Rock Developing culture-based math modules and professional coaching session 5 | 2/29/2024 | |
| 4.1 | 4.1.2.9 | Standing Rock Developing culture-based education phase 1 resource guide | 8/30/2024 | |
| 4.1 | 4.1.20.1 | LPS experiences in honors courses following open enrollment project | 5/22/2024 | |
| 4.1 | 4.1.20.2 | LPS experiences in honors courses following open enrollment project | 8/30/2024 | |
| 4.1 | 4.1.6.1 | Project Concept Paper: KS development of IPS implementation instruments and data collection processes | 8/19/2022 | |
| 4.1 | 4.1.6.10 | 4.1.6 KS Technical Support to Develop IPS Implementation and Participation Resources Phase 2 Session 2 Materials | 7/11/2024 | |
| 4.1 | 4.1.6.2 | Project proposal: KS development of IPS implementation instruments and data collection processes | 11/11/2022 | |
| 4.1 | 4.1.6.3 | KS Development of IPS implementation instruments and data collection processes: coaching materials 1 | 11/8/2022 | |
| 4.1 | 4.1.6.4 | KS Development of IPS implementation instruments and Data Collection Processes: Coaching Session Materials 2 | 1/6/2023 | |
| 4.1 | 4.1.6.5 | KS Development of IPS implementation instruments and data collection processes: Technical Support to Develop Participation Scope and Synthesis | 5/12/2023 | |
| 4.1 | 4.1.6.6 | KS Development of IPS implementation instruments and data collection processes: Coaching Session Materials 3 | 4/28/2023 | |
| 4.1 | 4.1.6.7 | KS Development of IPS Implementation: Technical Support to Develop IPS Implementation and Participation: coaching session materials 4 | 9/29/2023 | |
| 4.1 | 4.1.6.8 | KS Development of IPS Implementation Instruments: Stakeholder Feedback | 12/29/2023 | |
| 4.1 | 4.1.6.9 | KS Technical Support to Develop IPS Implementation and Participation Resources Phase 2 Session 1 Materials | 1/31/2024 | |
| 4.1 | 4.1.7.1 | Project Concept Paper: KS Summary of effective IPS practices | 9/16/2022 | |
| 4.1 | 4.1.7.2 | Project proposal: KS Summary of effective IPS practices | 11/11/2022 | |
| 4.1 | 4.1.8.1 | Project concept paper: MO Support District Tracking of New Teacher | 11/10/2022 | |
| 4.1 | 4.1.8.2 | Project proposal: MO Support District Tracking of New Teacher Experiences | 2/16/2023 | |
| 4.1 | 4.1.8.3 | Technical Support Focus Group Session 1 Materials: MO Support District Tracking of New Teacher Experiences | 4/28/2023 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|---|-------------------|--------------------|
| 4.1 | 4.1.8.4 | Technical Support Focus Group Session 2 Materials: MO Support District Tracking of New Teacher Experiences | 7/3/2023 | |
| 4.1 | 4.1.8.5 | Technical Support Session 3 Materials: MO Support District Tracking of New Teacher Experiences | 10/31/2023 | |
| 4.1 | 4.1.8.8 | Stakeholder Feedback Survey: MO Support District Tracking of New Teacher Experiences | 8/12/2024 | |
| 4.1 | 4.1.9.1 | Project Concept Paper: SD Learning from the design and implementation of the teacher apprenticeship pilot | 4/28/2023 | |
| 4.1 | 4.1.9.10 | Coaching Session 6 Materials: SD Learning from the design and implementation of the teacher apprenticeship pilot | 2/28/2025 | |
| 4.1 | 4.1.9.11 | Coaching Session 7 Materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 9/30/2025 | |
| 4.1 | 4.1.9.12 | Stakeholder Feedback Survey: SD learning from the design and implementation of the teacher apprenticeship pilot | 10/31/2025 | |
| 4.1 | 4.1.9.2 | Project Proposal: Design of the Mentoring Component of the South Dakota Teacher Apprenticeship Pilot | 6/30/2023 | |
| 4.1 | 4.1.9.3 | Coaching Session 1 Materials: Coaching to Apply insights from limited literature search in the initial design of the mentoring component | 6/12/2023 | |
| 4.1 | 4.1.9.4 | Limited Literature Scan Materials: Identifying and summarizing relevant research evidence on the components of effective mentoring programs | 6/12/2023 | |
| 4.1 | 4.1.9.5 | Coaching Session 2 Materials: Collaboratively collecting, interpreting, and using data to inform improvements to the mentoring program in its first | 12/29/2023 | |
| 4.1 | 4.1.9.6 | Coaching Session 3 Materials: Collaborative collecting, interpreting, and using data to inform improvements to the mentoring program in its first | 2/29/2024 | |
| 4.1 | 4.1.9.7 | Stakeholder Feedback Survey: SD learning from the design and implementation of the teacher apprenticeship pilot | 3/29/2024 | |
| 4.1 | 4.1.9.8 | Coaching session 4 materials: SD learning from the design and implementation of the teacher apprenticeship pilot | 4/30/2024 | |
| 4.1 | 4.1.9.9 | Coaching Session 5 Materials: SD Learning from the design and implementation of the teacher apprenticeship pilot | 9/30/2024 | |
| 4.2 | 4.2.1.1 | AAE 1 proposal | 7/29/2022 | |
| 4.2 | 4.2.1.2 | AAE MO Teacher Survey | 8/19/2022 | |
| 4.2 | 4.2.1.3 | AAE 1 Summary | 9/14/2022 | |
| 4.2 | 4.2.10.1 | AAE Proposal- SD Math Instruction | 4/9/2024 | |
| 4.2 | 4.2.10.2 | AAE Materials- SD Math Instruction | 4/25/2024 | |
| 4.2 | 4.2.10.3 | AAE Summary- SD Math Instruction | 5/3/2024 | |
| 4.2 | 4.2.11.1 | AAE Proposal- SD chronic absenteeism | 6/14/2024 | |
| 4.2 | 4.2.11.2 | AAE Proposal- SD chronic absenteeism | 7/15/2024 | |
| 4.2 | 4.2.11.3 | AAE Proposal- SD chronic absenteeism | 7/26/2024 | |
| 4.2 | 4.2.2.1 | AAE 2 Quarterly REL Central Summary | 3/31/2023 | |
| 4.2 | 4.2.3.1 | AAE Wyoming Teacher Retention Proposal | 1/5/2023 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|--|-------------------|--------------------|
| 4.2 | 4.2.3.2 | AAE Wyoming Teacher Retention Summary and PowerPoint | 2/1/2023 | |
| 4.2 | 4.2.3.3 | AAE WY Teacher Retention Summary | 3/14/2023 | |
| 4.2 | 4.2.4.1 | AAE South Dakota Proposal | 3/16/2023 | |
| 4.2 | 4.2.4.2 | AAE South Dakota PowerPoint | 4/28/2023 | |
| 4.2 | 4.2.4.3 | AAE South Dakota SFS and Summary | 4/28/2023 | |
| 4.2 | 4.2.5.1 | AAE KS Proposal | 6/9/2023 | |
| 4.2 | 4.2.5.2 | AAE KS Written Summaries of the information collected and an associated PowerPoint Slide Deck | 6/30/2023 | |
| 4.2 | 4.2.5.3 | AAE KS Summary | 7/31/2023 | |
| 4.2 | 4.2.6.1 | AAE Proposal - DPS Math Discourse | 9/27/2023 | |
| 4.2 | 4.2.6.2 | AAE Materials - DPS Math Discourse | 10/18/2023 | |
| 4.2 | 4.2.6.3 | AAE Summary - DPS Math Discourse | 11/9/2023 | |
| 4.2 | 4.2.7.1 | AAE Proposal - Wyoming Student Micro-Credentials | 11/13/2023 | |
| 4.2 | 4.2.7.2 | AAE Materials - WY Student Micro-Credentials | 1/9/2024 | |
| 4.2 | 4.2.7.3 | AAE Summary - WY Student Micro-Credentials | 1/23/2024 | |
| 4.2 | 4.2.8.1 | AAE Proposal - CDE Reduced Calendar | 12/27/2023 | |
| 4.2 | 4.2.8.2 | AAE Materials - CDE Reduced Calendar | 1/24/2024 | |
| 4.2 | 4.2.8.3 | AAE summary- CDE reduced school week | 2/7/2024 | |
| 4.2 | 4.2.9.1 | AAE Proposal - MO Teacher Induction | 1/17/2024 | |
| 4.2 | 4.2.9.2 | AAE Materials - MO Teacher Induction | 2/13/2024 | |
| 4.2 | 4.2.9.3 | AAE summary- MO Teacher Induction | 2/27/2024 | |
| 5.1 | 5.1.10.1 | LPS Factors that shape students' pathways to taking and succeeding in honors courses when starting high school study concept paper | 6/14/2024 | |
| 5.1 | 5.1.10.2 | LPS Factors that shape students' pathways to taking and succeeding in honors courses when starting high school study proposal | 8/30/2024 | |
| 5.1 | 5.1.2.2 | Algebra Toolkit Efficacy Study Proposal | 9/29/2022 | |
| 5.1 | 5.1.2.3 | Toolkit Study: Data Sharing agreement or memorandum of understanding with districts | 7/31/2024 | |
| 5.1 | 5.1.2.4 | Toolkit Study: Toolkit evaluation draft OMB clearance package for data collection instruments | 10/31/2023 | |
| 5.1 | 5.1.2.5 | Toolkit Study: Toolkit evaluation draft OMB clearance package for recruitment materials | 4/28/2023 | |
| 5.1 | 5.1.2.6 | Toolkit Study: Algebra toolkit efficacy study data collection instruments | 6/30/2023 | |
| 5.1 | 5.1.2.7 | Toolkit Study: Toolkit evaluation white paper | 5/31/2026 | |
| 5.1 | 5.1.2.8 | Algebra Toolkit Efficacy Study IRB application | 12/29/2023 | |
| 5.1 | 5.1.5.1 | Project concept paper: Colorado Teacher Pipeline Study | 9/23/2022 | |
| 5.1 | 5.1.6.1 | Project Concept Paper: MO Statewide Study to Identify Promising | 12/20/2022 | |
| 5.1 | 5.1.6.2 | Project Proposal: MO Statewide Study to Identify Promising Mentoring | 1/31/2023 | |
| 5.1 | 5.1.6.3 | MOU/DSA: MO Statewide Study to Identify Promising Mentoring Practices | 12/29/2023 | |
| 5.1 | 5.1.6.4 | Draft Report: MO Statewide Study to Identify Promising Mentoring | 12/31/2024 | |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|----------------|---------------------|---|----------------------|--|
| 5.1 | 5.1.7.1 | Concept Paper: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful at math | 11/4/2022 | |
| 5.1 | 5.1.7.2 | Project Proposal: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 4/28/2023 | |
| 5.1 | 5.1.7.3 | MOU/DSA: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 12/29/2023 | |
| 5.1 | 5.1.7.4 | Memo about available data: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 4/2/2024 | |
| 5.1 | 5.1.7.5 | Draft Report: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 11/12/2024 | |
| 5.1 | 5.1.8.1 | Concept Paper: Understanding Implementation of IPS in Kansas | 9/29/2023 | |
| 5.1 | 5.1.8.2 | Project Proposal: Understanding Implementation of IPS in Kansas | 12/29/2023 | |
| 5.1 | 5.1.8.3 | MOU/DSA: Understanding Implementation of IPS in Kansas | 4/30/2024 | |
| 5.1 | 5.1.8.4 | IRB Approval or exemption: Understanding Implementation of IPS in Kansas | 3/29/2024 | |
| 5.1 | 5.1.8.5 | Report: Understanding Implementation of IPS in Kansas | 1/31/2025 | |
| 5.2 | 5.2.1.2 | Proposal for toolkit to support evidence-based Algebra instruction in middle and high school | 5/18/2022 | |
| 5.2 | 5.2.1.3 | Toolkit Development Recruitment One-Pager | 8/3/2022 | |
| 5.2 | 5.2.1.4 | Toolkit Development Storyboard and Script | 10/27/2022 | |
| 5.2 | 5.2.1.5 | Toolkit Development: Submit Toolkit | 5/31/2024 | |
| 5.2 | 5.2.1.6 | Toolkit Development: Summary of revisions to toolkit based on efficacy evaluation results | 11/30/2025 | |
| 6.2 | 6.2.1.1 | Proposal: Infographic on REL CE and SR Partnership | 7/8/2022 | |
| 6.2 | 6.2.1.2 | Standing Rock Infographic Content | 7/29/2022 | |
| 6.2 | 6.2.1.3 | Standing Rock Infographic | 8/12/2022 | |
| 6.2 | 6.2.10.1 | Kansas Video Proposal | 8/8/2023 | |
| 6.2 | 6.2.10.2 | Kansas IPS Video Materials | 8/30/2023 | |
| 6.2 | 6.2.10.3 | Kansas IPS Final Video | 9/29/2023 | |
| 6.2 | 6.2.11.1 | Teacher Apprenticeship Infographic Proposal | 9/27/2023 | |
| 6.2 | 6.2.11.2 | Teacher Apprenticeship Infographic | 11/30/2023 | |
| 6.2 | 6.2.12.1 | Proposal: South Dakota Strengthening Teacher Pipelines Infographic | 7/1/2024 | We are dropping this infographic deliverable since we are planning a 6.3 webinar instead |
| 6.2 | 6.2.12.2 | Draft: South Dakota Strengthening Teacher Pipelines Infographic | 7/31/2024 | We are dropping this infographic deliverable since we are planning a 6.3 webinar instead |
| 6.2 | 6.2.12.3 | Final: South Dakota Strengthening Teacher Pipelines Infographic | 9/30/2024 | We are dropping this infographic deliverable since we are planning a 6.3 webinar instead |

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| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|---------------------|--|-----------------------|--|
| 6.2 | 6.2.13.1 | Proposal: North Dakota Developing Math Achievement Infographic | 10/1/2024 | We are dropping this infographic deliverable since we are planning a blog series instead |
| 6.2 | 6.2.13.2 | Draft: North Dakota Developing Math Achievement Infographic | 10/31/2024 | We are dropping this infographic deliverable since we are planning a blog series instead |
| 6.2 | 6.2.13.3 | Final: South Dakota Strengthening Teacher Pipelines Infographic | 12/31/2024 | We are dropping this infographic deliverable since we are planning a blog series instead |
| 6.2 | 6.2.14.1 | Proposal: Nebraska Supporting Elementary Readers Infographic | 10/1/2024 | |
| 6.2 | 6.2.14.2 | Draft: Nebraska Supporting Elementary Readers Infographic | 10/31/2024 | |
| 6.2 | 6.2.14.3 | Final: Nebraska Supporting Elementary Readers Infographic | 12/31/2024 | |
| 6.2 | 6.2.15.1 | Proposal: Colorado Teacher Diversity Infographic | 10/1/2024 | |
| 6.2 | 6.2.15.2 | Draft: Colorado Teacher Diversity Infographic | 10/31/2024 | |
| 6.2 | 6.2.15.3 | Final: Colorado Teacher Diversity Infographic | 12/31/2024 | |
| 6.2 | 6.2.16.1 | Proposal: Denver Public School Support 9th Grade Math Student Success TBD Infographic | 10/1/2024 | |
| 6.2 | 6.2.16.2 | Draft: Denver Public School Support 9th Grade Math Student Success TBD | 10/31/2024 | |
| 6.2 | 6.2.16.3 | Final: Denver Public School Support 9th Grade Math Student Success TBD | 12/31/2024 | |
| 6.2 | 6.2.17.1 | Proposal: Kansas Supporting Postsecondary and Workforce Readiness Infographic 3 part series | 10/1/2024 | |
| 6.2 | 6.2.17.2.1 | Draft: Guide 1 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 10/31/2024 | |
| 6.2 | 6.2.17.2.2 | Final: Guide 1 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 | |
| 6.2 | 6.2.17.3.1 | Draft: Guide 2 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 | |
| 6.2 | 6.2.17.3.2 | Final: Guide 2 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 | |
| 6.2 | 6.2.17.4.1 | Draft: Guide 3 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 10/31/2024 | |
| 6.2 | 6.2.17.4.2 | Final: Guide 3 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 12/31/2024 | |
| 6.2 | 6.2.18.1 | Proposal: Wyoming Mitigating Teacher Shortages Infographic | 10/1/2024 | |
| 6.2 | 6.2.18.2 | Draft: Wyoming Mitigating Teacher Shortages Infographic | 10/31/2024 | |
| 6.2 | 6.2.18.3 | Final: Wyoming Mitigating Teacher Shortages Infographic | 12/31/2024 | |
| 6.2 | 6.2.2.1 | Proposal: Fact Sheet on Culture-Based education and effect models of PD | 9/9/2022 | |
| 6.2 | 6.2.2.2 | Fact sheet on Culture-based education and effect models of PD (Final) | 11/30/2022 | |
| 6.2 | 6.2.3.1 | Proposal: Fact sheet Supporting School Transformation | 11/1/2022 | |
| 6.2 | 6.2.4.1 | Proposal: KS understanding IPS infographic or fact sheet | 10/28/2022 | |
| 6.2 | 6.2.4.2 | Final: KS Understanding IPS Infographic | 5/31/2023 | |

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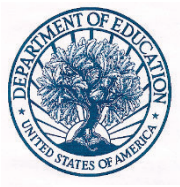
| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|--|-------------------|--------------------|
| 6.2 | 6.2.8.1 | Proposal: IPS Goal Setting and Portfolio Fact Sheet | 4/28/2023 | |
| 6.2 | 6.2.8.2 | Final: IPS Goal setting and portfolio fact sheet | 5/31/2023 | |
| 6.2 | 6.2.9.1 | Draft: ND Evidence-Based strategies for differentiated instruction and blended learning infographic | 12/9/2022 | |
| 6.2 | 6.2.9.2 | Final: ND Evidence-Based strategies for differentiated instruction and blended learning infographic | 12/21/2022 | |
| 6.3 | 6.3.1 | NNERPP conference materials | 7/5/2022 | |
| 6.3 | 6.3.10.1 | NDIES Conference Proposal | 4/1/2024 | |
| 6.3 | 6.3.10.2 | NDIES Conference Materials | 7/3/2024 | |
| 6.3 | 6.3.10.3 | NDIES Conference Summary | 8/2/2024 | |
| 6.3 | 6.3.11.1 | CASE Conference presentation abstract | 4/4/2024 | |
| 6.3 | 6.3.12.1 | SD Teacher apprenticeship webinar proposal | 7/31/2024 | |
| 6.3 | 6.3.12.2 | SD Teacher apprenticeship webinar materials | 11/15/2024 | |
| 6.3 | 6.3.12.3 | SD Webinar Post Event Materials | 12/13/2024 | |
| 6.3 | 6.3.2 | NNERPP conference summary | 8/3/2022 | |
| 6.3 | 6.3.3 | Teacher diversity webinar proposal | 12/14/2022 | |
| 6.3 | 6.3.4 | Teacher diversity webinar agenda and materials | 2/6/2023 | |
| 6.3 | 6.3.5 | Teacher diversity webinar summary | 3/27/2023 | |
| 6.3 | 6.3.6.1 | Webinar Proposal: Colorado Pipeline Webinar | 1/15/2023 | |
| 6.3 | 6.3.6.2 | Webinar Agenda and Materials: Colorado Pipeline Webinar | 3/8/2023 | |
| 6.3 | 6.3.6.3 | Webinar Summary: Colorado Pipeline Webinar | 4/19/2023 | |
| 6.3 | 6.3.7.1 | Webinar Proposal: Webinar on culture-based education, evidence-based professional learning, and teacher experiences designing and piloting the | 10/31/2023 | |
| 6.3 | 6.3.7.2 | Webinar Agenda and Materials: Webinar on culture-based education, evidence-based professional learning, and teacher experiences designing | 12/8/2023 | |
| 6.3 | 6.3.8.1 | Conference Proposal: CTE Proposal | 11/10/2023 | |
| 6.3 | 6.3.8.2 | CTE Conference Materials | 1/22/2024 | |
| 6.3 | 6.3.9.1 | Learning Forward Conference Proposal- Standing Rock presentation | 1/17/2024 | |
| 6.4 | 6.4.1.1 | Draft newsletter (Summer 2022) | 6/3/2022 | |
| 6.4 | 6.4.1.2 | Disseminate Final Newsletter (Summer 2022) | 6/30/2022 | |
| 6.4 | 6.4.10 | Fall 2024 Newsletter | 9/6/2024 | |
| 6.4 | 6.4.11 | Winter 2024 Newsletter | 12/6/2024 | |

REL Central Deliverables Schedule
June 2024

| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|-------------------------------------|-------------------|--------------------|
| 6.4 | 6.4.2.1 | Draft newsletter (Fall 2022) | 9/2/2022 | |
| 6.4 | 6.4.3.1 | Draft Newsletter (Winter 2022) | 11/18/2022 | |
| 6.4 | 6.4.3.2 | Final Newsletter (Winter 2022) | 12/30/2022 | |
| 6.4 | 6.4.4.1 | Draft Newsletter (Spring 2023) | 3/3/2023 | |
| 6.4 | 6.4.4.2 | Final Newsletter (Spring 2023) | 3/31/2023 | |
| 6.4 | 6.4.5.1 | Draft Summer Newsletter 2023 | 6/1/2023 | |
| 6.4 | 6.4.5.2 | Final Summer Newsletter 2023 | 6/30/2023 | |
| 6.4 | 6.4.6.1 | Draft Fall Newsletter | 9/1/2023 | |
| 6.4 | 6.4.6.2 | Final Fall Newsletter 2023 | 9/29/2023 | |
| 6.4 | 6.4.7.1 | Draft Winter Newsletter 2023 | 12/1/2023 | |
| 6.4 | 6.4.7.2 | Final Winter Newsletter 2023 | 12/29/2023 | |
| 6.4 | 6.4.8 | Spring 2024 Newsletter | 3/1/2024 | |
| 6.4 | 6.4.9 | Summer 2024 Newsletter | 5/31/2024 | |
| 6.5 | 6.5.1.1 | Blog 1 | 7/29/2022 | |
| 6.5 | 6.5.1.10 | Blog 10: DPS Mathematical Discourse | 7/31/2024 | |
| 6.5 | 6.5.1.11 | Blog 11: SR | 12/27/2024 | |
| 6.5 | 6.5.1.12 | Blog 12 | 12/27/2024 | |
| 6.5 | 6.5.1.2 | Blog 2 | 8/24/2022 | |
| 6.5 | 6.5.1.3 | Blog 3 | 10/10/2022 | |
| 6.5 | 6.5.1.4 | Blog 4 | 12/14/2022 | |
| 6.5 | 6.5.1.5 | Blog 5 (DPS) | 4/28/2023 | |
| 6.5 | 6.5.1.6 | Blog 6 (South Dakota Highlight) | 8/31/2023 | |
| 6.5 | 6.5.1.7 | Blog 7 (Wyoming Highlight) | 10/31/2023 | |
| 6.5 | 6.5.1.8 | Blog 8 | 12/29/2023 | |
| 6.5 | 6.5.1.9 | Blog 9: CO Diversity | 7/31/2024 | |
| 6.6 | 6.6.1.01 | Social media posts | 3/31/2022 | |
| 6.6 | 6.6.1.02 | Social media posts | 4/29/2022 | |
| 6.6 | 6.6.1.03 | Social media posts | 5/31/2022 | |
| 6.6 | 6.6.1.04 | Social media posts | 6/30/2022 | |
| 6.6 | 6.6.1.05 | Social media posts | 7/31/2022 | |
| 6.6 | 6.6.1.06 | Social media posts | 8/31/2022 | |
| 6.6 | 6.6.1.07 | Social media posts | 9/30/2022 | |
| 6.6 | 6.6.1.08 | Social media posts | 10/28/2022 | |
| 6.6 | 6.6.1.09 | Social media posts | 11/30/2022 | |
| 6.6 | 6.6.1.10 | Social media posts | 12/30/2022 | |
| 6.6 | 6.6.1.11 | Social media posts | 1/31/2023 | |
| 6.6 | 6.6.1.12 | Social Media Posts | 2/28/2023 | |
| 6.6 | 6.6.1.13 | Social Media Posts | 3/31/2023 | |
| 6.6 | 6.6.1.14 | Social Media Posts | 4/28/2023 | |
| 6.6 | 6.6.1.15 | Social Media Posts | 5/31/2023 | |
| 6.6 | 6.6.1.16 | Social Media Posts | 6/30/2023 | |

REL Central Deliverables Schedule
June 2024

| Subtask | Deliverable number | Deliverable Name | Contract due date | Contract mod notes |
|---------|--------------------|----------------------|-------------------|--------------------|
| 6.6 | 6.6.1.17 | Social Media Posts | 7/31/2023 | |
| 6.6 | 6.6.1.18 | Social Media Posts | 8/31/2023 | |
| 6.6 | 6.6.1.19 | Social Media Posts | 9/29/2023 | |
| 6.6 | 6.6.1.20 | Social Media Posts | 10/31/2023 | |
| 6.6 | 6.6.1.21 | Social Media Posts | 11/30/2023 | |
| 6.6 | 6.6.1.22 | Social Media Posts | 12/29/2023 | |
| 6.6 | 6.6.1.23 | Social Media Posts | 1/31/2024 | |
| 6.6 | 6.6.1.24 | Social Media Posts | 2/29/2024 | |
| 6.6 | 6.6.1.25 | Social Media Posts | 3/29/2024 | |
| 6.6 | 6.6.1.26 | Social Media Posts | 4/30/2024 | |
| 6.6 | 6.6.1.27 | Social Media Posts | 5/31/2024 | |
| 6.6 | 6.6.1.28 | Social Media Posts | 6/28/2024 | |
| 6.6 | 6.6.1.29 | Social Media Posts | 7/31/2024 | |
| 6.6 | 6.6.1.30 | Social Media Posts | 8/30/2024 | |
| 6.6 | 6.6.1.31 | Social Media Posts | 9/30/2024 | |
| 6.6 | 6.6.1.32 | Social Media Posts | 10/31/2024 | |
| 6.6 | 6.6.1.33 | Social Media Posts | 11/29/2024 | |
| 6.6 | 6.6.1.34 | Social Media Posts | 12/31/2024 | |
| 6.7 | 6.7.1 | Templates | 6/1/2022 | |
| 6.7 | 6.7.2.1 | REL Central brochure | 9/30/2022 | |



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF FINANCE AND OPERATIONS
OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

Determination and Findings to add Funding for Contract 91990022C0015 - REL Central P00008

| | |
|--------------------------------------|--|
| Contract Number: | 91990022C0015 - REL Central |
| Period of Performance: | January 3, 2022, through January 2, 2027 |
| Acquisition Plan Tracking Number: | 2016 |
| Purchase Amount: | \$2,000,000.00 |
| NAICS Code: | 611710: Educational Support Services |
| Contractor: | Mathematica |
| UEI | T41EGEAK2L35 |
| Product and Service Code (PSC): | R499: Support Professional: Other |
| Service Contract Coding Declaration: | Other Function |

AUTHORITY

Modification P00008 is executed in accordance with the following contract clauses:

Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

BACKGROUND

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

PURPOSE/ DESCRIPTION OF CHANGES

The purpose of this modification is the following:

- Provide funds in the amount of \$2,000,000.00 for Year 4 of the contract
- Incorporate an updated deliverable schedule
- Incorporate an updated key personnel list

FUNDING

The total contract value remains \$24,187,916.08.

The total funded value is increasing by \$2,000,000.00, from \$14,913,580.50 to \$16,913,580.50.

Confirmation of funds was received by Gloria Vera on Nov 21, 2024. Funding will be provided directly on the award via the contract writing system (AMS).

PERIOD OF PERFORMANCE

This modification does not affect the period of performance. The period of performance remains January 3, 2022, through January 2, 2027.

SYNOPSIS

There is no requirement for synopsisizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsisized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

SCOPE OF WORK

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

RECOMMENDATION

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00008.

Recommend:

12/19/2024

X Chyteira Lawson

Chyteira Lawson

Contract Specialist

Signed by: Office of Finance and Operations

| | | | | | | | |
|---|--|------------------------------------|--|--|--|--|--|
| 2. AMENDMENT/MODIFICATION NO. P00008 | | 3. EFFECTIVE DATE See Block 16C | | 4. REQUISITION/PURCHASE REQ. NO. EDOIES-25-000016 | | 5. PROJECT NO. (If applicable) | |
| 6. ISSUED BY US Department of Education 400 Maryland Avenue SW Washington DC 20202 | | CODE CAM | | 7. ADMINISTERED BY (If other than Item 6) | | CODE | |
| 8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) MATHEMATICA INC.(00000011) Attn: No Contact Available 600 ALEXANDER PARK PRINCETON NJ 085406346 | | | | (x) | | 9A. AMENDMENT OF SOLICITATION NO. | |
| | | | | | | 9B. DATED (SEE ITEM 11) | |
| | | | | x | | 10A. MODIFICATION OF CONTRACT/ORDER NO. 91990022C0015 | |
| | | | | | | 10B. DATED (SEE ITEM 13) 03/02/2022 | |
| CODE T41EGEAK2L35 | | FACILITY CODE | | | | | |

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended. ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required) Net Increase: \$2,000,000.00
1100M2024.B.2025.610000.ER000000.RL2.2550A.0.000.117.N.0000.000000.000000

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

| | |
|-----------|---|
| CHECK ONE | A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A. |
| | B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). |
| x | C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 Alternate I: Changes - Cost Reimbursement |
| | D. OTHER (Specify type of modification and authority) |

E. IMPORTANT: Contractor ☐ is not, ☒ is required to sign this document and return 1 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

UEI: T41EGEAK2L35

Period of Performance: 03/02/2022 to 01/02/2027

Change Item 0004 to read as follows (amount shown is the total amount):

Regional Educational Laboratories (REL) Central

0004 Year 4 of Performance

4,700,323.25

Incrementally Funded Amount: \$2,000,000.00

Product/Service Code: R699

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9 A or 10A, as heretofore changed, remains unchanged and in full force and effect.

| | | | |
|--|------------------------------|--|--------------------------------|
| 15A. NAME AND TITLE OF SIGNER (Type or print) Susan Boudreau, VP Legal and Contracts Strategy | | 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Joseph Gibbs TEL: 202-453-7716 EMAIL: Joseph.Gibbs@ed.gov | |
| 15B. CONTRACTOR/OFFEROR Susan Boudreau (Signature of person authorized to sign) | 15C. DATE SIGNED 12/19/24 | 16B. UNITED STATES OF AMERICA JOSEPH GIBBS (Signature of Contracting Officer) | 16C. DATE SIGNED 11/20/2024 |

NAME OF OFFEROR OR CONTRACTOR
MATHEMATICA INC.(00000011)

| ITEM NO. (A) | SUPPLIES/SERVICES (B) | QUANTITY (C) | UNIT (D) | UNIT PRICE (E) | AMOUNT (F) |
|-----------------|--------------------------|-----------------|-------------|-------------------|---------------|
| | | | | | |

The purpose of this modification is the following:

- Provide funds in the amount of \$2,000,000.00 for Year 4 of the contract to the CPFF CLIN
- Incorporate an updated key personnel list
- Incorporate an updated deliverable schedule

The total contract value remains \$24,187,916.08.

The total funded value is increasing by \$2,000,000.00, from \$14,913,580.50 to \$16,913,580.50.

Except as provided herein, all other terms and conditions of contract 91990022C0015 remains unchanged and in full force and effect.

Contractor's Statement of Release

In consideration of the modification agreed to herein as complete Equitable Adjustment for the updated Period of Performance, the contractor hereby releases the Government from all liability under this contract for further adjustments attributable to such facts or circumstances giving rise to this change.

Section H - Special Contract Requirements

Summary of Clause Changes:

Clause 3452.243-70 is incorporated as follows:

3452.243-70 Key personnel. (OCT 2023)

(a) The personnel designated as key personnel in this contract are considered to be essential to the work being performed hereunder. Prior to diverting any of the specified individuals to other programs, or otherwise substituting any other personnel for specified personnel, the contractor shall notify the contracting officer reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the contract effort. No diversion or substitution shall be made by the contractor without written consent of the contracting officer; provided, that the contracting officer may ratify a diversion or substitution in writing and that ratification shall constitute the consent of the contracting officer required by this clause. The contract shall be modified to reflect the addition or deletion of key personnel. (b) The following personnel have been identified as Key Personnel in the performance of this contract:

| Name | Labor category |
|------------------|----------------------------------|
| Stephen Lipscomb | REL Director, Task 2 Lead |
| Susan Lopez | REL Deputy Director, Task 1 Lead |
| Stephen Meyer | Task 3 Lead |
| Doug Van Dine | Task 4 Lead |
| Philip Gleason | Task 5 Lead |

| | |
|----------------|-------------|
| Kirsten Miller | Task 6 Lead |
|----------------|-------------|

(End of Clause)

| Subtask Deliverable number | Deliverable Name | Contract due date | Notes |
|----------------------------|--|-------------------|-------|
| 1.1 1.1.0 | Redacted proposal | 3/11/2022 | |
| 1.1 1.1.1 | Summary of REL Kickoff Meeting | 4/14/2022 | |
| 1.2 1.2.1.01 | Biweekly/Bimonthly call agenda (3/16/22) | 3/14/2022 | |
| 1.2 1.2.1.02 | Biweekly/Bimonthly call summary memo (3/16/22) | 3/23/2022 | |
| 1.2 1.2.1.03 | Biweekly/Bimonthly call agenda (3/29/22) | 3/25/2022 | |
| 1.2 1.2.1.04 | Biweekly/Bimonthly call summary memo (3/29/22) | 4/5/2022 | |
| 1.2 1.2.1.05 | Biweekly/Bimonthly call agenda (4/12/22) | 4/8/2022 | |
| 1.2 1.2.1.06 | Biweekly/Bimonthly call summary memo (4/12/22) | 4/19/2022 | |
| 1.2 1.2.1.07 | Biweekly/Bimonthly call agenda (4/27/22) | 4/25/2022 | |
| 1.2 1.2.1.08 | Biweekly/Bimonthly call summary memo (4/27/22) | 5/4/2022 | |
| 1.2 1.2.1.09 | Biweekly/Bimonthly call agenda (5/11/22) | 5/9/2022 | |
| 1.2 1.2.1.10 | Biweekly/Bimonthly call summary memo (5/11/22) | 5/18/2022 | |
| 1.2 1.2.1.100 | Biweekly/bimonthly call summary (1/31/2024) | 2/7/2024 | |
| 1.2 1.2.1.101 | Biweekly/bimonthly call agenda (2/14/2024) | 2/12/2024 | |
| 1.2 1.2.1.102 | Biweekly/bimonthly call summary (2/14/2024) | 2/22/2024 | |
| 1.2 1.2.1.103 | Biweekly/bimonthly call agenda (2/28/2024) | 2/26/2024 | |
| 1.2 1.2.1.104 | Biweekly/bimonthly call summary (2/28/2024) | 3/6/2024 | |
| 1.2 1.2.1.105 | Biweekly/bimonthly call agenda (3/13/2024) | 3/11/2024 | |
| 1.2 1.2.1.106 | Biweekly/bimonthly call summary (3/13/2024) | 3/20/2024 | |
| 1.2 1.2.1.107 | Biweekly/bimonthly call agenda (3/27/2024) | 3/25/2024 | |
| 1.2 1.2.1.108 | Biweekly/bimonthly call summary (3/27/2024) | 4/3/2024 | |

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| 1.2 1.2.1.109 | Biweekly/bimonthly call agenda (4/10/2024) | 4/8/2024 |
| 1.2 1.2.1.11 | Biweekly/Bimonthly call agenda (5/25/22) | 5/23/2022 |
| 1.2 1.2.1.110 | Biweekly/bimonthly call summary (4/10/2024) | 4/17/2024 |
| 1.2 1.2.1.111 | Biweekly/bimonthly call agenda (4/24/2024) | 4/22/2024 |
| 1.2 1.2.1.112 | Biweekly/bimonthly call summary (4/24/2024) | 5/3/2024 |
| 1.2 1.2.1.113 | Biweekly/bimonthly call agenda (5/8/2024) | 5/6/2024 |
| 1.2 1.2.1.114 | Biweekly/bimonthly call summary (5/8/2024) | 5/15/2024 |
| 1.2 1.2.1.115 | Biweekly/bimonthly call agenda (5/22/2024) | 5/20/2024 |
| 1.2 1.2.1.116 | Biweekly/bimonthly call summary (5/22/2024) | 5/30/2024 |
| 1.2 1.2.1.117 | Biweekly/bimonthly call agenda (6/5/2024) | 6/3/2024 |
| 1.2 1.2.1.118 | Biweekly/bimonthly call summary (6/5/2024) | 6/12/2024 |
| 1.2 1.2.1.119 | Biweekly/bimonthly call agenda (6/20/2024) | 6/13/2024 |
| 1.2 1.2.1.12 | Biweekly/Bimonthly call summary memo (5/25/22) | 6/1/2022 |
| 1.2 1.2.1.120 | Biweekly/bimonthly call summary (6/20/2024) | 6/24/2024 |
| 1.2 1.2.1.121 | Biweekly/bimonthly call agenda (7/3/2024) | 7/1/2024 |
| 1.2 1.2.1.122 | Biweekly/bimonthly call summary (7/3/2024) | 7/11/2024 |
| 1.2 1.2.1.123 | Biweekly/bimonthly call agenda (7/17/2024) | 7/24/2024 |
| 1.2 1.2.1.124 | Biweekly/bimonthly call summary (7/17/2024) | 8/2/2024 |
| 1.2 1.2.1.125 | Biweekly/bimonthly call agenda (7/31/2024) | 7/29/2024 |
| 1.2 1.2.1.126 | Biweekly/bimonthly call summary (7/31/2024) | 8/7/2024 |
| 1.2 1.2.1.127 | Biweekly/bimonthly call agenda (8/14/2024) | 8/12/2024 |
| 1.2 1.2.1.128 | Biweekly/bimonthly call summary (8/14/2024) | 8/21/2024 |
| 1.2 1.2.1.129 | Biweekly/bimonthly call agenda (8/26/2024) | 8/22/2024 |
| 1.2 1.2.1.13 | Biweekly/Bimonthly call agenda (6/8/22) | 6/6/2022 |
| 1.2 1.2.1.130 | Biweekly/bimonthly call summary (8/26/2024) | 9/3/2024 |

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| 1.2 1.2.1.131 | Biweekly/bimonthly call agenda (9/11/2024) | 9/9/2024 |
| 1.2 1.2.1.132 | Biweekly/bimonthly call summary (9/11/2024) | 9/18/2024 |
| 1.2 1.2.1.133 | Biweekly/bimonthly call agenda (9/25/2024) | 9/23/2024 |
| 1.2 1.2.1.134 | Biweekly/bimonthly call summary (9/25/2024) | 10/2/2024 |
| 1.2 1.2.1.135 | Biweekly/bimonthly call agenda (10/9/2024) | 10/7/2024 |
| 1.2 1.2.1.136 | Biweekly/bimonthly call summary (10/9/2024) | 10/17/2024 |
| 1.2 1.2.1.137 | Biweekly/bimonthly call agenda (10/23/2024) | 10/21/2024 |
| 1.2 1.2.1.138 | Biweekly/bimonthly call summary (10/23/2024) | 10/30/2024 |
| 1.2 1.2.1.139 | Biweekly/bimonthly call agenda (11/6/2024) | 11/4/2024 |
| 1.2 1.2.1.14 | Biweekly/Bimonthly call summary memo (6/8/22) | 6/15/2022 |
| 1.2 1.2.1.140 | Biweekly/bimonthly call summary (11/6/2024) | 11/14/2024 |
| 1.2 1.2.1.141 | Biweekly/bimonthly call agenda (11/20/2024) | 11/18/2024 |
| 1.2 1.2.1.142 | Biweekly/bimonthly call summary (11/20/2024) | 11/27/2024 |
| 1.2 1.2.1.143 | Biweekly/bimonthly call agenda (12/4/2023) | 12/2/2024 |
| 1.2 1.2.1.144 | Biweekly/bimonthly call summary (12/4/2023) | 12/11/2024 |

| Subtask Deliverable number | Deliverable Name | Contract due date | Notes |
|-------------------------------|---|-------------------|-------|
| 1.2 1.2.1.145 | Biweekly/bimonthly call agenda (12/18/2024) | 12/16/2024 | |
| 1.2 1.2.1.146 | Biweekly/bimonthly call summary (12/18/2024) | 12/26/2024 | |
| 1.2 1.2.1.147 | Biweekly/bimonthly call agenda (1/2/2025) | 12/30/2024 | |
| 1.2 1.2.1.148 | Biweekly/bimonthly call summary (1/2/2025) | 1/9/2025 | |
| 1.2 1.2.1.149 | Biweekly/bimonthly call agenda (1/15/2025) | 1/13/2025 | |
| 1.2 1.2.1.150 | Biweekly/bimonthly call summary (1/15/2025) | 1/22/2025 | |
| 1.2 1.2.1.151 | Biweekly/bimonthly call agenda (1/29/2025) | 1/27/2025 | |
| 1.2 1.2.1.152 | Biweekly/bimonthly call summary (1/29/2025) | 2/5/2025 | |

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|---------------|--|-----------|
| 1.2 1.2.1.153 | Biweekly/bimonthly call agenda (2/12/2025) | 2/10/2025 |
| 1.2 1.2.1.154 | Biweekly/bimonthly call summary (2/12/2025) | 2/19/2025 |
| 1.2 1.2.1.155 | Biweekly/bimonthly call agenda (2/26/2025) | 2/24/2025 |
| 1.2 1.2.1.156 | Biweekly/bimonthly call summary (2/26/2025) | 3/5/2025 |
| 1.2 1.2.1.157 | Biweekly/bimonthly call agenda (3/12/2025) | 3/10/2025 |
| 1.2 1.2.1.158 | Biweekly/bimonthly call summary (3/12/2025) | 3/19/2025 |
| 1.2 1.2.1.159 | Biweekly/bimonthly call agenda (3/26/2025) | 3/24/2025 |
| 1.2 1.2.1.160 | Biweekly/bimonthly call summary (3/26/2025) | 4/2/2025 |
| 1.2 1.2.1.161 | Biweekly/bimonthly call agenda (4/9/2025) | 4/7/2025 |
| 1.2 1.2.1.162 | Biweekly/bimonthly call summary (4/9/2025) | 4/16/2025 |
| 1.2 1.2.1.163 | Biweekly/bimonthly call agenda (4/23/2025) | 4/21/2025 |
| 1.2 1.2.1.164 | Biweekly/bimonthly call summary (4/23/2025) | 4/30/2025 |
| 1.2 1.2.1.165 | Biweekly/bimonthly call agenda (5/7/2025) | 5/5/2025 |
| 1.2 1.2.1.166 | Biweekly/bimonthly call summary (5/7/2025) | 5/14/2025 |
| 1.2 1.2.1.167 | Biweekly/bimonthly call agenda (5/21/2025) | 5/19/2025 |
| 1.2 1.2.1.168 | Biweekly/bimonthly call summary (5/21/2025) | 5/28/2025 |
| 1.2 1.2.1.169 | Biweekly/bimonthly call agenda (6/4/2025) | 6/2/2025 |
| 1.2 1.2.1.170 | Biweekly/bimonthly call summary (6/4/2025) | 6/11/2025 |
| 1.2 1.2.1.171 | Biweekly/bimonthly call agenda (6/18/2025) | 6/16/2025 |
| 1.2 1.2.1.172 | Biweekly/bimonthly call summary (6/18/2025) | 6/25/2025 |
| 1.2 1.2.1.173 | Biweekly/bimonthly call agenda (7/2/2025) | 6/30/2025 |
| 1.2 1.2.1.174 | Biweekly/bimonthly call summary (7/2/2025) | 7/10/2025 |
| 1.2 1.2.1.175 | Biweekly/bimonthly call agenda (7/16/2025) | 7/14/2025 |
| 1.2 1.2.1.176 | Biweekly/bimonthly call summary (7/16/2025) | 7/23/2025 |
| 1.2 1.2.1.177 | Biweekly/bimonthly call agenda (7/30/2025) | 7/28/2025 |

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| 1.2 1.2.1.178 | Biweekly/bimonthly call summary (7/30/2025) | 8/6/2025 |
| 1.2 1.2.1.179 | Biweekly/bimonthly call agenda (8/13/2025) | 8/11/2025 |
| 1.2 1.2.1.180 | Biweekly/bimonthly call summary (8/13/2025) | 8/20/2025 |
| 1.2 1.2.1.181 | Biweekly/bimonthly call agenda (8/27/2025) | 8/25/2025 |
| 1.2 1.2.1.182 | Biweekly/bimonthly call summary (8/27/2025) | 9/4/2025 |
| 1.2 1.2.1.183 | Biweekly/bimonthly call agenda (9/10/2025) | 9/8/2025 |
| 1.2 1.2.1.184 | Biweekly/bimonthly call summary (9/10/2025) | 9/17/2025 |
| 1.2 1.2.1.185 | Biweekly/bimonthly call agenda (9/24/2025) | 9/22/2025 |
| 1.2 1.2.1.186 | Biweekly/bimonthly call summary (9/24/2025) | 10/1/2025 |
| 1.2 1.2.1.187 | Biweekly/bimonthly call agenda (10/8/2025) | 10/6/2025 |
| 1.2 1.2.1.188 | Biweekly/bimonthly call summary (10/8/2025) | 10/16/2025 |
| 1.2 1.2.1.189 | Biweekly/bimonthly call agenda (10/22/2025) | 10/20/2025 |
| 1.2 1.2.1.190 | Biweekly/bimonthly call summary (10/22/2025) | 10/29/2025 |
| 1.2 1.2.1.191 | Biweekly/bimonthly call agenda (11/5/2025) | 11/3/2025 |
| 1.2 1.2.1.192 | Biweekly/bimonthly call summary (11/5/2025) | 11/13/2025 |
| 1.2 1.2.1.193 | Biweekly/bimonthly call agenda (11/19/2025) | 11/17/2025 |
| 1.2 1.2.1.194 | Biweekly/bimonthly call summary (11/19/2025) | 11/26/2025 |
| 1.2 1.2.1.195 | Biweekly/bimonthly call agenda (12/3/2025) | 12/1/2025 |
| 1.2 1.2.1.196 | Biweekly/bimonthly call summary (12/3/2025) | 12/10/2025 |
| 1.2 1.2.1.197 | Biweekly/bimonthly call agenda (12/17/2025) | 12/15/2025 |
| 1.2 1.2.1.198 | Biweekly/bimonthly call summary (12/17/2025) | 12/24/2025 |
| 1.2 1.2.1.199 | Biweekly/bimonthly call agenda (12/31/2025) | 12/29/2025 |
| 1.2 1.2.1.15 | Biweekly/Bimonthly call agenda (6/22/22) | 6/20/2022 |
| 1.2 1.2.1.16 | Biweekly/Bimonthly call summary memo (6/22/22) | 6/29/2022 |
| 1.2 1.2.1.17 | Biweekly/Bimonthly call agenda (7/6/22) | 7/1/2022 |

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| 1.2 1.2.1.18 | Biweekly/Bimonthly call summary memo (7/6/22) | 7/13/2022 |
| 1.2 1.2.1.19 | Biweekly/Bimonthly call agenda (7/20/22) | 7/18/2022 |
| 1.2 1.2.1.20 | Biweekly/Bimonthly call summary memo (7/20/22) | 7/27/2022 |

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| 1.2 1.2.1.21 | Biweekly/Bimonthly call agenda (8/3/22) | 8/1/2022 | |
| 1.2 1.2.1.22 | Biweekly/Bimonthly call summary memo (8/3/22) | 8/10/2022 | |
| 1.2 1.2.1.23 | Biweekly/Bimonthly call agenda (8/17/22) | 8/15/2022 | |
| 1.2 1.2.1.24 | Biweekly/Bimonthly call summary memo (8/17/22) | 8/24/2022 | |
| 1.2 1.2.1.25 | Biweekly/Bimonthly call agenda (8/31/22) | 8/29/2022 | |
| 1.2 1.2.1.26 | Biweekly/Bimonthly call summary memo (8/31/22) | 9/7/2022 | |
| 1.2 1.2.1.27 | Biweekly/Bimonthly call agenda (9/14/22) | 9/12/2022 | |
| 1.2 1.2.1.28 | Biweekly/Bimonthly call summary memo (9/14/22) | 9/21/2022 | |
| 1.2 1.2.1.29 | Biweekly/Bimonthly call agenda (9/28/22) | 9/26/2022 | |
| 1.2 1.2.1.30 | Biweekly/Bimonthly call summary memo (9/28/22) | 10/5/2022 | |
| 1.2 1.2.1.31 | Biweekly/Bimonthly call agenda (10/12/22) | 10/10/2022 | |
| 1.2 1.2.1.32 | Biweekly/Bimonthly call summary memo (10/12/22) | 10/19/2022 | |
| 1.2 1.2.1.33 | Biweekly/Bimonthly call agenda (10/26/22) | 10/24/2022 | |
| 1.2 1.2.1.34 | Biweekly/Bimonthly call summary memo (10/26/22) | 11/2/2022 | |
| 1.2 1.2.1.35 | Biweekly/Bimonthly call agenda (11/9/22) | 11/7/2022 | |
| 1.2 1.2.1.36 | Biweekly/Bimonthly call summary memo (11/9/22) | 11/16/2022 | |
| 1.2 1.2.1.37 | Biweekly/Bimonthly call agenda (11/23/22) | 11/21/2022 | |
| 1.2 1.2.1.38 | Biweekly/Bimonthly call summary memo (11/23/22) | 11/30/2022 | |
| 1.2 1.2.1.39 | Biweekly/Bimonthly call agenda (12/7/22) | 12/5/2022 | |
| 1.2 1.2.1.40 | Biweekly/Bimonthly call summary memo (12/7/22) | 12/14/2022 | |
| 1.2 1.2.1.41 | Biweekly/Bimonthly call agenda | 12/19/2022 | |

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| | (12/21/22) | |
| 1.2 1.2.1.42 | Biweekly/Bimonthly call summary memo (12/21/22) | 12/28/2022 |
| 1.2 1.2.1.43 | Biweekly/Bimonthly call agenda (1/4/23) | 1/2/2023 |
| 1.2 1.2.1.44 | Biweekly/Bimonthly summary memo (1/4/23) | 1/11/2023 |
| 1.2 1.2.1.45 | Biweekly/Bimonthly call agenda (1/18/23) | 1/16/2023 |
| 1.2 1.2.1.46 | Biweekly/Bimonthly summary memo (1/18/23) | 1/25/2023 |
| 1.2 1.2.1.47 | Biweekly/Bimonthly call agenda (2/1/23) | 1/30/2023 |
| 1.2 1.2.1.48 | Biweekly/Bimonthly summary memo (2/1/23) | 2/8/2023 |
| 1.2 1.2.1.49 | Biweekly/Bimonthly call agenda (2/15/23) | 2/13/2023 |
| 1.2 1.2.1.50 | Biweekly/Bimonthly summary memo (2/15/2023) | 2/22/2023 |
| 1.2 1.2.1.51 | Biweekly/Bimonthly call agenda (3/1/23) | 2/27/2023 |
| 1.2 1.2.1.52 | Biweekly/Bimonthly summary memo (3/1/23) | 3/8/2023 |
| 1.2 1.2.1.53 | Biweekly/Bimonthly call agenda (3/15/2023) | 3/13/2023 |
| 1.2 1.2.1.54 | Biweekly/Bimonthly summary memo (3/15/2023) | 3/22/2023 |
| 1.2 1.2.1.55 | Biweekly/Bimonthly call agenda (3/29/2023) | 3/27/2023 |
| 1.2 1.2.1.56 | Biweekly/Bimonthly Summary Memo (3/29/2023) | 4/5/2023 |
| 1.2 1.2.1.57 | Biweekly/Bimonthly Call Agenda (4/12/23) | 4/10/2023 |
| 1.2 1.2.1.58 | Biweekly/Bimonthly summary memo (4/12/2023) | 4/19/2023 |
| 1.2 1.2.1.59 | Biweekly/Bimonthly Call Agenda (5/1/23) | 4/26/2023 |
| 1.2 1.2.1.60 | Biweekly/Bimonthly summary memo (5/1/2023) | 5/8/2023 |
| 1.2 1.2.1.61 | Biweekly/Bimonthly call agenda (5/10/23) | 5/8/2023 |
| 1.2 1.2.1.62 | Biweekly/Bimonthly summary memo | 5/17/2023 |
| 1.2 1.2.1.63 | Biweekly/bimonthly call agenda (5/24/23) | 5/22/2023 |
| 1.2 1.2.1.64 | Biweekly/bimonthly summary memo (5/24/23) | 5/31/2023 |
| 1.2 1.2.1.65 | Biweekly/Bimonthly call agenda (6/7/23) | 6/5/2023 |
| 1.2 1.2.1.66 | Biweekly/Bimonthly summary memo (6/7/23) | 6/14/2023 |

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| 1.2 1.2.1.67 | Biweekly/Bimonthly call agenda (6/21/23) | 6/19/2023 |
| 1.2 1.2.1.68 | Biweekly/Bimonthly summary memo (6/21/23) | 6/28/2023 |
| 1.2 1.2.1.69 | Biweekly/Bimonthly call agenda (7/5/23) | 7/3/2023 |
| 1.2 1.2.1.70 | Biweekly/Bimonthly summary memo (7/5/23) | 7/12/2023 |
| 1.2 1.2.1.71 | Biweekly/Bimonthly call agenda (7/19/2023) | 7/17/2023 |
| 1.2 1.2.1.72 | Biweekly/Bimonthly summary memo (7/19/23) | 7/26/2023 |
| 1.2 1.2.1.73 | Biweekly/Bimonthly call agenda (8/4/23) | 8/2/2023 |
| 1.2 1.2.1.74 | Biweekly/Bimonthly summary memo (8/2/23) | 8/11/2023 |
| 1.2 1.2.1.75 | Biweekly/Bimonthly call agenda (8/16/23) | 8/14/2023 |
| 1.2 1.2.1.76 | Biweekly/Bimonthly summary memo (8/16/2023) | 8/23/2023 |
| 1.2 1.2.1.77 | Biweekly/Bimonthly call agenda (8/30/23) | 8/28/2023 |
| 1.2 1.2.1.78 | Biweekly/Bimonthly summary memo (8/30/23) | 9/6/2023 |
| 1.2 1.2.1.79 | Biweekly/Bimonthly call agenda (9/13/2023) | 9/11/2023 |
| 1.2 1.2.1.80 | Biweekly/Bimonthly summary memo (9/13/2023) | 9/20/2023 |
| 1.2 1.2.1.81 | Biweekly/Bimonthly call agenda (9/27/23) | 9/25/2023 |

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| 1.2 1.2.1.82 | Biweekly/Bimonthly summary memo (9/27/23) | 10/4/2023 | |
| 1.2 1.2.1.83 | Biweekly/Bimonthly Call agenda (10/11/23) | 10/9/2023 | |
| 1.2 1.2.1.84 | Biweekly/Bimonthly summary memo (10/11/23) | 10/18/2023 | |
| 1.2 1.2.1.85 | Biweekly/Bimonthly call agenda (10/25/2023) | 10/23/2023 | |
| 1.2 1.2.1.86 | Biweekly/Bimonthly summary memo (10/25/2023) | 11/1/2023 | |
| 1.2 1.2.1.87 | Biweekly/bimonthly call agenda (11/8/23) | 11/9/2023 | |
| 1.2 1.2.1.88 | Biweekly/bimonthly summary memo (11/8/2023) | 11/20/2023 | |
| 1.2 1.2.1.89 | Biweekly/Bimonthly call agenda (11/22/23) | 11/16/2023 | |
| 1.2 1.2.1.90 | Biweekly/Bimonthly summary memo (11/22/23) | 11/28/2023 | |

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| 1.2 1.2.1.91 | Biweekly/Bimonthly call agenda (12/12/23) | 12/8/2023 |
| 1.2 1.2.1.92 | Biweekly/Bimonthly summary memo (12/12/23) | 12/19/2023 |
| 1.2 1.2.1.93 | Biweekly/Bimonthly call agenda (12/20/23) | 12/18/2023 |
| 1.2 1.2.1.94 | Biweekly/Bimonthly summary memo (12/20/2023) | 12/27/2023 |
| 1.2 1.2.1.95 | Biweekly/bimonthly call agenda (1/3/24) | 12/29/2023 |
| 1.2 1.2.1.96 | Biweekly/bimonthly call summary (1/3/24) | 1/10/2024 |
| 1.2 1.2.1.97 | Biweekly/bimonthly call agenda (1/17/2024) | 1/12/2024 |
| 1.2 1.2.1.98 | Biweekly/bimonthly call summary (1/17/2024) | 1/24/2024 |
| 1.2 1.2.1.99 | Biweekly/bimonthly call agenda (1/31/2024) | 1/29/2024 |
| 1.4 1.4.1.1 | Department presentation briefing materials | 12/29/2023 |
| 1.4 1.4.1.2 | Department presentation summary | 12/29/2023 |
| 1.4 1.4.2 | Mid-point meeting slides | 5/13/2024 |
| 1.5 1.5.0 | Report on the establishment of the Governing Board | 4/5/2022 |
| 1.5 1.5.1.1 | Draft meeting agenda and materials for Governing Board me | 7/15/2022 |
| 1.5 1.5.1.2 | Final meeting agendas and materials for Governing Board Me | 7/29/2022 |
| 1.5 1.5.1.3 | Governing Board meeting summary to IES (Spring 2022) | 8/19/2022 |
| 1.5 1.5.2.1 | Draft meeting agenda and materials for Governing Board me | 10/19/2022 |
| 1.5 1.5.2.2 | Final meeting agendas and materials for Governing Board Me | 11/2/2022 |
| 1.5 1.5.2.3 | Governing Board meeting summary to IES (Fall 2022) | 11/23/2022 |
| 1.5 1.5.3.1 | Draft meeting agenda and materials for Governing Board me | 4/21/2023 |
| 1.5 1.5.3.2 | Final meeting agenda and materials for Governing Board mee | 5/5/2023 |
| 1.5 1.5.3.3 | Governing Board meeting summary to IES (Spring 2023) | 5/26/2023 |
| 1.5 1.5.3.4 | CARS Actuals | 7/26/2023 |
| 1.5 1.5.4.1 | Draft meeting agenda and materials for Governing Board me | 10/5/2023 |
| 1.5 1.5.4.2 | Final meeting agenda and materials for Governing Board mee | 10/19/2023 |
| 1.5 1.5.4.3 | Governing Board meeting summary to IES (Fall 2023) | 12/29/2023 |
| 1.5 1.5.5.1 | Meeting Agenda and Materials (Spring 2024) | 4/26/2024 |
| 1.5 1.5.5.2 | Meeting Summary (Spring 2024) | 5/24/2024 |

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| 1.5 1.5.6.1 | Meeting agenda and Materials (Fall 2024) | 7/18/2024 |
| 1.5 1.5.6.2 | Meeting Summary (Fall 2024) | 8/22/2024 |
| 1.5 1.5.7.1 | Meeting Agenda and materials (Spring 2025) | 5/30/2025 |
| 1.5 1.5.7.2 | Meeting Summary (Spring 2025) | 6/4/2025 |
| 1.5 1.5.8.1 | Meeting agenda and materials (Fall 2025) | 11/3/2025 |
| 1.5 1.5.8.2 | Meeting Summary (Fall 2025) | 12/8/2025 |
| 1.6 1.6.1.1 | Bi-annual Assessment of Progress Report (Draft) | 6/30/2022 |
| 1.6 1.6.1.2 | Bi-annual Assessment of Progress Report (Final) | 6/30/2022 |
| 1.6 1.6.2.1 | Bi-annual Assessment of Progress Report (Draft) | 12/1/2022 |
| 1.6 1.6.2.2 | Bi-annual Assessment of Progress Report (Final) | 1/5/2023 |
| 1.6 1.6.3.1 | Bi-Annual Assessment of Progress Report (Draft) | 6/1/2023 |
| 1.6 1.6.3.2 | Bi-Annual Assessment of Progress Report (Final) | 7/3/2023 |
| 1.6 1.6.4.1 | Bi-Annual Assessment of Progress Report (Draft) | 12/1/2023 |
| 1.6 1.6.4.2 | Bi-Annual Assessment of Progress Report (Final) | 1/10/2024 |
| 1.6 1.6.5 | Bi-annual Assessment of Progress Report | 6/3/2024 |
| 1.6 1.6.6 | Bi-annual Assessment of Progress Report | 12/2/2024 |
| 1.6 1.6.7 | Bi-annual Assessment of Progress Report- June 2025 | 6/2/2025 |
| 1.6 1.6.8 | Bi-annual Assessment of Progress Report- December 2025 | 12/1/2025 |
| 1.7 1.7.01 | Monthly Progress Report | 4/14/2022 |
| 1.7 1.7.02 | Monthly Progress Report | 5/13/2022 |
| 1.7 1.7.03 | Monthly Progress Report | 6/14/2022 |
| 1.7 1.7.04 | Monthly Progress Report | 7/15/2022 |
| 1.7 1.7.05 | Monthly Progress Report | 8/12/2022 |
| 1.7 1.7.06 | Monthly Progress Report | 9/15/2022 |

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| 1.7 1.7.07 | Monthly Progress Report | 10/17/2022 | |
| 1.7 1.7.08 | Monthly Progress Report | 11/15/2022 | |
| 1.7 1.7.09 | Monthly Progress Report | 12/14/2022 | |
| 1.7 1.7.10 | Monthly Progress Report | 1/13/2023 | |
| 1.7 1.7.11 | Monthly Progress Report | 2/14/2023 | |
| 1.7 1.7.12 | Monthly Progress Report | 3/14/2023 | |
| 1.7 1.7.13 | Monthly Progress Report | 4/14/2023 | |
| 1.7 1.7.14 | Monthly Progress Report | 5/12/2023 | |
| 1.7 1.7.15 | Monthly Progress Report | 6/14/2023 | |
| 1.7 1.7.16 | Monthly Progress Report | 7/17/2023 | |
| 1.7 1.7.17 | Monthly Progress Report | 8/14/2023 | |

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| 1.7 1.7.18 | Monthly Progress Report | 9/15/2023 |
| 1.7 1.7.19 | Monthly Progress Report | 10/13/2023 |
| 1.7 1.7.20 | Monthly Progress Report | 11/14/2023 |
| 1.7 1.7.21 | Monthly Progress Report | 12/14/2023 |
| 1.7 1.7.22 | Monthly Progress Report | 1/16/2024 |
| 1.7 1.7.23 | Monthly Progress Report | 2/14/2024 |
| 1.7 1.7.24 | Monthly Progress Report | 3/14/2024 |
| 1.7 1.7.25 | Monthly Progress Report | 4/12/2024 |
| 1.7 1.7.26 | Monthly Progress Report | 5/14/2024 |
| 1.7 1.7.27 | Monthly Progress Report | 6/14/2024 |
| 1.7 1.7.28 | Monthly Progress Report | 7/15/2024 |
| 1.7 1.7.29 | Monthly Progress Report | 8/14/2024 |
| 1.7 1.7.30 | Monthly Progress Report | 9/16/2024 |
| 1.7 1.7.31 | Monthly Progress Report | 10/15/2024 |
| 1.7 1.7.32 | Monthly Progress Report | 11/15/2024 |
| 1.7 1.7.33 | Monthly Progress Report | 12/13/2024 |
| 1.7 1.7.34 | Monthly Progress Report | 1/15/2025 |
| 1.7 1.7.35 | Monthly Progress Report | 2/14/2025 |
| 1.7 1.7.36 | Monthly Progress Report | 3/14/2025 |
| 1.7 1.7.37 | Monthly Progress Report | 4/14/2025 |
| 1.7 1.7.38 | Monthly Progress Report | 5/14/2025 |
| 1.7 1.7.39 | Monthly Progress Report | 6/13/2025 |
| 1.7 1.7.40 | Monthly Progress Report | 7/15/2025 |
| 1.7 1.7.41 | Monthly Progress Report | 8/14/2025 |
| 1.7 1.7.42 | Monthly Progress Report | 9/15/2025 |
| 1.7 1.7.43 | Monthly Progress Report | 10/14/2025 |
| 1.7 1.7.44 | Monthly Progress Report | 11/14/2025 |
| 1.7 1.7.45 | Monthly Progress Report | 12/12/2025 |
| 1.8 1.8.1 | Performance reporting | 6/28/2022 |
| 1.8 1.8.10 | Quarterly Performance Reporting (2024 Q4) | 9/30/2024 |
| 1.8 1.8.11 | Quarterly Performance Reporting (2025 Q1) | 1/17/2025 |
| 1.8 1.8.12 | Quarterly Performance Reporting (2025 Q2) | 3/31/2025 |
| 1.8 1.8.13 | Quarterly Performance Reporting (2025 Q3) | 7/31/2025 |
| 1.8 1.8.14 | Quarterly Performance Reporting (2025 Q4) | 9/30/2025 |
| 1.8 1.8.2 | Quarterly Performance Reporting (2022 Q4) | 9/28/2022 |
| 1.8 1.8.3 | Quarterly Performance Reporting (2023 Q1) | 1/9/2023 |
| 1.8 1.8.4 | Quarterly Performance Reporting (2023 Q2) | 3/27/2023 |
| 1.8 1.8.5 | Quarterly Performance Reporting (2023 Q3) | 6/28/2023 |
| 1.8 1.8.6 | Quarterly Performance Reporting (2023 Q4) | 9/28/2023 |

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| 1.8 1.8.7 | Quarterly Performance Reporting (2024 Q1) | 1/10/2024 |
| 1.8 1.8.8 | Quarterly Performance Reporting (2024 Q2) | 3/29/2024 |
| 1.8 1.8.9 | Quarterly Performance Reporting (2024 Q3) | 7/31/2024 |
| 1.9 1.9.1 | Submission of security documents for low- and moderate-lev | 3/15/2022 |
| 1.9 1.9.2.1 | Quarterly Cybersecurity Training | 6/1/2022 |
| 1.9 1.9.2.2 | Quarterly Cybersecurity Training | 9/7/2022 |
| 1.9 1.9.2.3 | Cybersecurity Training | 2/13/2023 |
| 1.9 1.9.2.4 | Quarterly Cybersecurity Training | 5/15/2023 |
| 1.9 1.9.2.5 | Quarterly Cybersecurity Training | 9/8/2023 |
| 1.9 1.9.2.6 | Quarterly Cybersecurity Training | 2/16/2024 |
| 1.9 1.9.2.7 | Quarterly Cybersecurity Training (2024 course 2) | 5/17/2024 |

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|----------------------------|---|-------------------|-------|
| 1.9 1.9.2.8 | Quarterly Cybersecurity training | 8/30/2024 | |
| 1.9 1.9.2.9 | Quarterly Cybersecurity training | 2/17/2025 | |
| 1.9 1.9.2.10 | Quarterly Cybersecurity training | 5/30/2025 | |
| 1.9 1.9.2.11 | Quarterly Cybersecurity training | 8/30/2025 | |
| 1.9 1.9.3.1 | 2022 IMR Training | 12/30/2022 | |
| 1.9 1.9.3.2 | 2024 IMR Training | 1/2/2024 | |
| 2.1 2.1.1.0 | REL Planned Partnerships and Projects on the Topic of Teache | 7/8/2022 | |
| 2.1 2.1.1.1.1 | Cross-REL meting agenda and materials | 8/31/2022 | |
| 2.1 2.1.1.1.2 | Cross-REL meeting summary | 9/28/2022 | |
| 2.1 2.1.1.10.1 | Quarterly cross-REL meeting agenda and materials, Q4 | 11/15/2024 | |
| 2.1 2.1.1.10.2 | Quarterly cross-REL meeting summary, Q4 | 12/13/2024 | |
| 2.1 2.1.1.11.1 | Proposal for cross-REL product highlighting work across the p | 9/20/2024 | |
| 2.1 2.1.1.11.2 | Materials of cross-REL product highlighting work across the p | 10/25/2024 | |
| 2.1 2.1.1.12.1 | Quarterly cross-REL meeting agenda and materials, Q1 | 3/31/2025 | |
| 2.1 2.1.1.12.2 | Quarterly cross-REL meeting summary, Q1 | 4/14/2025 | |
| 2.1 2.1.1.13.1 | Quarterly cross-REL meeting agenda and materials, Q2 | 6/30/2025 | |
| 2.1 2.1.1.13.2 | Quarterly cross-REL meeting summary, Q2 | 7/14/2025 | |
| 2.1 2.1.1.14.1 | Quarterly cross-REL meeting agenda and materials, Q3 | 9/30/2025 | |
| 2.1 2.1.1.14.2 | Quarterly cross-REL meeting summary, Q3 | 10/14/2025 | |
| 2.1 2.1.1.15.1 | Quarterly cross-REL meeting agenda and materials, Q4 | 12/31/2025 | |
| 2.1 2.1.1.15.2 | Quarterly cross-REL meeting summary, Q4 | 1/14/2025 | |
| 2.1 2.1.2.1 | Teacher workforce leadership area meeting 2 agenda and ma | 11/16/2022 | |

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| 2.1 2.1.2.2 | Teacher workforce meeting 2 summary | 11/16/2022 |
| 2.1 2.1.3.1 | Cross-REL meeting agenda and materials, quarterly | 3/1/2023 |
| 2.1 2.1.3.2 | Cross-REL meeting summary, quarterly | 3/31/2023 |
| 2.1 2.1.3.3 | Teacher Workforce Community of Practice Infographic Propo | 8/31/2023 |
| 2.1 2.1.3.4 | Teacher Workforce Community of Practice Infographic | 12/29/2023 |
| 2.1 2.1.4.1 | Cross-REL Meeting agenda and materials, quarterly | 5/23/2023 |
| 2.1 2.1.4.2 | Cross-REL Meeting summary, quarterly | 6/20/2023 |
| 2.1 2.1.5.1 | Cross-REL meeting agenda and materials, quarterly | 9/30/2023 |
| 2.1 2.1.5.2 | Cross-REL meeting summary, quarterly | 11/7/2023 |
| 2.1 2.1.6.1 | Cross-REL meeting agenda and materials, quarterly | 1/17/2024 |
| 2.1 2.1.6.2 | Cross-REL Meeting summary, quarterly | 2/14/2024 |
| 2.1 2.1.7.1 | Quarterly cross-REL meeting agenda and materials, Q1 | 4/9/2024 |
| 2.1 2.1.7.2 | Quarterly cross-REL meeting summary, Q1 | 5/7/2024 |
| 2.1 2.1.8.1 | Quarterly cross-REL meeting agenda and materials, Q2 | 6/14/2024 |
| 2.1 2.1.8.2 | Quarterly cross-REL meeting summary, Q2 | 7/12/2024 |
| 2.1 2.1.9.1 | Quarterly cross-REL meeting agenda and materials, Q3 | 9/16/2024 |
| 2.1 2.1.9.2 | Quarterly cross-REL meeting summary, Q3 | 10/11/2024 |
| 2.2 2.2.1.1 | AERA toolkit poster session proposal | 7/12/2024 |
| 2.2 2.2.1.2 | AERA toolkit poster session materials | 4/9/2025 |
| 2.2 2.2.1.3 | AERA toolkit poster session post conference materials | 5/9/2025 |
| 2.3 2.3.1 | Signed letter(s) of intent with each regional Comprehensive C | 5/30/2022 |
| 2.3 2.3.2.1 | Joint needs sensing summary memo | 3/31/2023 |
| 2.3 2.3.2.2 | Joint needs sensing summary memo | 3/29/2024 |
| 2.3 2.3.2.3 | Joint needs sensing summary memo | 3/31/2025 |
| 3.1 3.1.1 | Partnership Proposal: DPS Identifying promising approaches f | 6/30/2022 |
| 3.1 3.1.10 | Nebraska LPS equitable access to and success in honors cours | 4/5/2024 |
| 3.1 3.1.2 | Partnership proposal: Strengthening culture-based education | 6/1/2022 |
| 3.1 3.1.3 | Partnership proposal: Teacher diversity in Colorado | 8/31/2022 |
| 3.1 3.1.4 | Partnership proposal: Supporting postsecondary and workfor | 7/15/2022 |
| 3.1 3.1.5 | Partnership proposal: Teacher retention in Missouri | 7/29/2022 |
| 3.1 3.1.6 | Partnership Proposal: Mitigating teacher shortages in Wyomi | 8/31/2022 |
| 3.1 3.1.7 | Partnership proposal: Accelerating math | 9/16/2022 |

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| | achievement in Nort | |
| 3.1 3.1.9 | Partnership proposal: South Dakota on Human Capital Develo | 2/28/2023 |
| 3.2 3.2.1.1 | DPS Strengthening Student Pathways to Success in 9th Grade | 6/14/2024 |
| 3.2 3.2.10.2 | 2023 Partnership Stakeholder Feedback Survey Item Selectio | 9/29/2023 |
| 3.2 3.2.10.3 | 2023 Annual Partnership Stakeholder Feedback Survey Respo | 11/30/2023 |
| 3.2 3.2.10.4 | 2024 Annual Partnership Stakeholder Feedback Survey Respo | 11/29/2024 |
| 3.2 3.2.2.1 | Quarterly partnership meeting agenda and materials: Strengt | 10/31/2022 |
| 3.2 3.2.2.2 | Standing Rock Strengthening Culture-Based Math Education P | 9/30/2024 |

| Subtask Deliverable number | Deliverable Name Contract due date | Notes |
|----------------------------|--|------------|
| 3.2 3.2.3.1 | Colorado Teacher Diversity Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.4.1 | Kansas Supporting postsecondary and workforce readiness of | 6/14/2024 |
| 3.2 3.2.5.1 | Missouri Teacher Retention Partnership Meeting Materials | 6/14/2024 |
| 3.2 3.2.6.1 | Wyoming Mitigating Teacher Shortages Partnership Meeting | 9/30/2024 |
| 3.2 3.2.7.1 | North Dakota Accelerating Math Achievement Meeting Mate | 6/14/2024 |
| 3.2 3.2.9.1 | South Dakota Strengthening Teacher Pipeline Partnership Me | 6/14/2024 |
| 3.3 3.3.1 | Partnership Proposal: Math Community of Practice | 6/14/2024 |
| 3.3 3.3.1.1 | Math CoP Meeting 1 materials | 10/31/2024 |
| 3.3 3.3.1.2 | Math CoP Meeting 2 materials | 12/20/2024 |
| 3.3 3.3.1.3 | Math CoP Meeting #3 materials | 10/4/2024 |
| 3.3 3.3.1.4 | Math CoP Meeting #4 materials | 3/31/2025 |
| 3.3 3.3.1.5 | Math CoP Meeting #5 materials | 6/30/2025 |
| 3.3 3.3.1.6 | Math CoP Meeting #6 materials | 9/30/2025 |
| 3.3 3.3.1.7 | Math CoP Meeting #7 materials | 12/31/2025 |
| 4.1 4.1.10.1 | NDE Foundational literacy concept paper | 1/19/2024 |
| 4.1 4.1.10.1 | NE Foundational Literacy Concept Paper | 5/31/2024 |
| 4.1 4.1.10.2 | NDE Foundational literacy project proposal | 7/31/2024 |
| 4.1 4.1.10.3 | NDE Foundational literacy project: Session 1 Materials | 8/29/2024 |
| 4.1 4.1.10.4 | NDE Foundational literacy project: Session 2 Materials | 10/25/2025 |
| 4.1 4.1.10.5 | Nebraska Foundational Literacy focus group protocols | 1/31/2025 |
| 4.1 4.1.10.6 | Nebraska Foundational Literacy Session 3 | 4/30/2025 |
| 4.1 4.1.10.7 | Nebraska Foundational Literacy SFS | 6/30/2025 |

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| 4.1 4.1.12.1 | North Dakota Evidence-based strategies for Differentiated ins | 8/31/2022 |
| 4.1 4.1.12.10 | Communities of Practice Coaching Session 1 Materials | 9/29/2023 |
| 4.1 4.1.12.11 | Community of Practice and Continuous Improvement Session | 2/13/2024 |
| 4.1 4.1.12.12 | Communities of Practice and Continuous Improvement Sessio | 3/26/2024 |
| 4.1 4.1.12.13 | Communities of Practice and Continuous Improvement Sessio | 4/30/2024 |
| 4.1 4.1.12.14 | North Dakota Evidence-based strategies for differentiated ins | 6/3/2024 |
| 4.1 4.1.12.15 | Agenda for SY 24-25 deep-dive coaching session 1 | 9/30/2024 |
| 4.1 4.1.12.16 | Agenda for SY 24-25 deep-dive coaching session 2 | 10/31/2024 |
| 4.1 4.1.12.17 | Agenda for SY 24-25 deep-dive coaching session 3 | 11/20/2024 |
| 4.1 4.1.12.18 | Agenda for SY 24-25 deep-dive coaching session 4 | 12/31/2024 |
| 4.1 4.1.12.19 | Agenda for SY 24-25 deep-dive coaching session 5 | 2/28/2025 |
| 4.1 4.1.12.2 | North Dakota Evidence-based strategies for differentiated ins | 11/30/2022 |
| 4.1 4.1.12.20 | Agenda for SY 24-25 deep-dive coaching session 6 | 4/30/2025 |
| 4.1 4.1.12.21 | Agenda for SY 25-26 deep-dive coaching session 1 | 10/30/2025 |
| 4.1 4.1.12.22 | Agenda for SY 25-26 deep-dive coaching session 2 | 2/28/2026 |
| 4.1 4.1.12.23 | Pre-CoP Planning Agenda for NDDPI and NDREA Staff Monthl | 8/1/2024 |
| 4.1 4.1.12.3 | North Dakota Evidence-based strategies for differentiated ins | 2/28/2023 |
| 4.1 4.1.12.4 | North Dakota Evidence-based strategies for differentiated ins | 3/31/2023 |
| 4.1 4.1.12.5 | North Dakota evidence based strategies for differentiated ins | 4/28/2023 |
| 4.1 4.1.12.6 | North Dakota evidence based strategies for differentiated ins | 5/31/2023 |
| 4.1 4.1.12.7 | Introduction to the Community of Practice (CoP) and Continu | 8/29/2023 |
| 4.1 4.1.12.8 | Communities of Practice and Continuous Improvement Sessio | 10/31/2023 |
| 4.1 4.1.12.9 | Communities of Practice and Continuous Practice Session 3 M | 1/2/2024 |
| 4.1 4.1.13.1 | Wyoming Support for Formative Evaluation of the Teacher Ap | 1/31/2023 |
| 4.1 4.1.13.2 | Wyoming Support for Formative Evaluation of the Teacher Ap | 3/31/2023 |

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| 4.1 4.1.13.3 | Coaching Session 1 Materials: WY Support for Formative Eval | 5/1/2023 |
| 4.1 4.1.13.4 | Coaching Session 2 Materials: WY Support for Formative Eval | 6/8/2023 |
| 4.1 4.1.13.5 | Coaching Session 3 Materials: WY Support for Formative Eval | 9/29/2023 |
| 4.1 4.1.13.6 | Coaching Session 4 Materials: WY Support for Formative Eval | 7/31/2024 |
| 4.1 4.1.13.7 | Coaching Session 5 Materials: WY Support for Formative Eval | 10/31/2024 Deliverable drop request sent 10/ |
| 4.1 4.1.13.8 | Stakeholder Feedback Survey: WY Support for Formative Eval | 11/29/2024 |
| 4.1 4.1.14.1 | Project Concept Paper: MO Technical support to help Ritenou | 11/10/2022 |
| 4.1 4.1.14.2 | Project Proposal: MO Technical support to help Ritenour Scho | 1/26/2023 |
| 4.1 4.1.14.3 | Technical Support Session 1 Materials: MO Technical support | 4/11/2023 |
| 4.1 4.1.14.4 | Technical Support Session 2 Materials: MO technical support | 6/16/2023 |
| 4.1 4.1.14.5 | Materials for Additional Support Session to provide guidance: | 12/29/2023 |
| 4.1 4.1.14.6 | Technical Support Session 3 Materials: MO Technical support | 12/29/2023 |
| 4.1 4.1.14.7 | Technical Support Session 4 Materials: MO technical support | 4/30/2024 |
| 4.1 4.1.14.8 | Stakeholder Feedback Survey: MO technical support to help R | 7/31/2024 |

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|----------------------------|--|-------------------|-------|
| 4.1 4.1.14.9 | Phase 2 Project Proposal: MO Ritenour Technical support | 10/31/2024 | |
| 4.1 4.1.14.10 | Ritenour Activity 1 materials | 2/28/2025 | |
| 4.1 4.1.14.11 | Ritenour Activity 2 materials | 5/30/2025 | |
| 4.1 4.1.14.12 | Ritenour Stakeholder Feedback Survey | 6/28/2025 | |
| 4.1 4.1.16.1 | Concept Paper: CO Factors Data Collection | 12/7/2022 | |
| 4.1 4.1.16.2 | Project Proposal: CO Factors Data Collection | 2/24/2023 | |
| 4.1 4.1.16.3 | Coaching Session 1 Materials: CO Factors Data Collection | 3/31/2023 | |
| 4.1 4.1.16.4 | Coaching Session 2 Materials: CO Factors Data Collection | 7/26/2023 | |
| 4.1 4.1.16.5 | Coaching Session 3 Materials: CO Factors Data Collection | 9/29/2023 | |
| 4.1 4.1.16.6 | Stakeholder Feedback Survey: CO Factors Data Collection | 12/29/2023 | |
| 4.1 4.1.16.7 | Survey analysis guidance | 1/18/2024 | |
| 4.1 4.1.16.8 | CO Teacher diversity project proposal- Phase 2 | 8/30/2024 | |
| 4.1 4.1.16.9 | CO Phase 2 GYO Activity 1 meeting materials | 11/15/2024 | |

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| 4.1 4.1.16.10 | CO Phase 2 GYO Activity 2 meeting materials | 1/31/2025 |
| 4.1 4.1.16.11 | CO Phase 2 GYO How-to-Guide | 10/31/2025 |
| 4.1 4.1.17.1 | Concept Paper: DPS Better Understanding students' percepti | 11/4/2022 |
| 4.1 4.1.17.2 | Project Proposal: DPS Better understanding students' percept | 4/28/2023 |
| 4.1 4.1.17.7 | SFS Responses: Strengthening student pathways to success in | 7/29/2024 |
| 4.1 4.1.17.8 | DPS grade 9 math classroom discourse coaching session 1 ma | 11/21/2023 |
| 4.1 4.1.17.9 | Technical support to develop and pilot an instrument to mea | 11/30/2023 |
| 4.1 4.1.17.9 | Technical support to develop and pilot an instrument to mea | 2/9/2024 |
| 4.1 4.1.18.1 | 4.1.18 WY Micro-Credentials Concept Paper | 12/29/2023 |
| 4.1 4.1.19.1 | CO Reduced calendar year project concept paper | 4/11/2024 |
| 4.1 4.1.19.2 | CO Reduced calendar year project proposal | 6/28/2024 |
| 4.2 4.1.19.3 | CO RCY Interview Protocol | 1/31/2025 |
| 4.3 4.1.19.4 | CO RCY Case Study and Report Templates | 2/28/2025 |
| 4.4 4.1.19.5 | CO RCY Project SFS | 5/31/2025 |
| 4.1 4.1.2.1 | Project concept paper: Standing Rock Developing culture-bas | 7/15/2022 |
| 4.1 4.1.2.11 | Standing Rock Developing Culture-Based Math Modules: Part | 12/29/2023 |
| 4.1 4.1.2.12 | Standing Rock Developing Culture-Based Math Modules: Sup | 7/12/2024 |
| 4.1 4.1.2.13 | Standing Rock Developing Culture-Based Math-Modules: Sup | 12/30/2024 |
| 4.1 4.1.2.14 | Stakeholder Feedback Survey: SR Developing Culture-Based M | 12/30/2024 |
| 4.1.2.15 | Standing Rock Phase 3 proposal addendum | 12/30/2024 |
| 4.1 4.1.2.2 | Project proposal: Standing Rock Developing culture-based ma | 9/28/2022 |
| 4.1 4.1.2.3 | Standing Rock Developing culture-based math modules and p | 1/6/2023 |
| 4.1 4.1.2.4 | Standing Rock Developing culture-based math modules and p | 4/28/2023 |
| 4.1 4.1.2.5 | Standing Rock Developing culture-based math modules and p | 9/29/2023 |
| 4.1 4.1.2.6 | Standing Rock Developing culture-based math modules and p | 12/29/2023 |
| 4.1 4.1.2.7 | Standing Rock Developing culture-based math modules and p | 2/29/2024 |
| 4.1 4.1.2.9 | Standing Rock Developing culture-based education phase 1 re | 8/30/2024 |
| 4.1 4.1.20.1 | LPS experiences in honors courses following open enrollment | 5/22/2024 |
| 4.1 4.1.20.2 | LPS experiences in honors courses following open enrollment | 8/30/2024 |

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| 4.1 4.1.20.3 | LPS expanding honors courses and access literature scan | 10/2/2024 |
| 4.1 4.1.20.4 | LPS experiences in honors courses measurement plan | 1/31/2025 |
| 4.1 4.1.20.5 | LPS experiences in honors courses data collection protocol | 2/28/2025 |
| 4.1 4.1.20.6 | LPS experiences in honors courses handout on data findings | 6/30/2025 |
| 4.1 4.1.20.7 | LPS experiences in honors courses SFS | 7/31/2025 |
| 4.1 4.1.21.1 | Coaching for Teton County School District principals to be bet | 8/15/2024 |
| 4.1 4.1.21.2 | Coaching for Teton County School District principals to be bet | 12/31/2024 |
| 4.1 4.1.22.1 | Support to Address Chronic Absenteeism in South Dakota con | 10/15/2024 |
| 4.1 4.1.22.2 | Support to Address Chronic Absenteeism in South Dakota pro | 12/31/2024 |
| 4.1 4.1.6.1 | Project Concept Paper: KS development of IPS implementatio | 8/19/2022 |
| 4.1 4.1.6.10 | 4.1.6 KS Technical Support to Develop IPS Implementation an | 7/11/2024 |
| 4.1 4.1.6.11 | REL-CE KS Phase 2 SFS questions to IES | 7/19/2024 |
| 4.2 4.1.6.12 | KS IPS Phase 3 Proposal Addendum | 2/28/2025 |
| 4.1 4.1.6.2 | Project proposal: KS development of IPS implementation inst | 11/11/2022 |
| 4.1 4.1.6.3 | KS Development of IPS implementation instruments and data | 11/8/2022 |
| 4.1 4.1.6.4 | KS Development of IPS implementation Instruments and Data | 1/6/2023 |
| 4.1 4.1.6.5 | KS Development of IPS implementation instruments and data | 5/12/2023 |
| 4.1 4.1.6.6 | KS Development of IPS implementation instruments and data | 4/28/2023 |
| 4.1 4.1.6.7 | KS Development of IPS Implementation: Technical Support to | 9/29/2023 |

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| 4.1 4.1.6.8 | KS Development of IPS Implementation Instruments: Stakeho | 12/29/2023 |
| 4.1 4.1.6.9 | KS Technical Support to Develop IPS Implementation and Par | 1/31/2024 |
| 4.1 4.1.7.1 | Project Concept Paper: KS Summary of effective IPS practices | 9/16/2022 |
| 4.1 4.1.7.2 | Project proposal: KS Summary of effective IPS practices | 11/11/2022 |
| 4.1 4.1.8.1 | Project concept paper: MO Support District Tracking of New T | 11/10/2022 |
| 4.1 4.1.8.10 | MO Phase 2 meeting materials | 10/10/2024 |
| 4.1 4.1.8.11 | University City Activity 1 materials | 12/31/2024 |

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| 4.1 4.1.8.12 | University City Activity 2 materials | 3/31/2025 |
| 4.1 4.1.8.13 | University City Activity 3 materials | 6/30/2025 |
| 4.1 4.1.8.14 | University City Stakeholder Feedback Survey | 6/28/2025 |
| 4.1 4.1.8.2 | Project proposal: MO Support District Tracking of New Teach | 2/16/2023 |
| 4.1 4.1.8.3 | Technical Support Focus Group Session 1 Materials: MO Supp | 4/28/2023 |
| 4.1 4.1.8.4 | Technical Support Focus Group Session 2 Materials: MO Supp | 7/3/2023 |
| 4.1 4.1.8.5 | Technical Support Session 3 Materials: MO Support District Tr | 10/31/2023 |
| 4.1 4.1.8.8 | Stakeholder Feedback Survey: MO Support District Tracking o | 8/12/2024 |
| 4.1 4.1.8.9 | Phase 2 proposal addendum: MO Support District Tracking of | 9/26/2024 |
| 4.1 4.1.9.1 | Project Concept Paper: SD Learning from the design and impl | 4/28/2023 |
| 4.1 4.1.9.10 | Coaching Session 6 Materials: SD Learning from the design an | 11/29/2024 |
| 4.1 4.1.9.11 | Coaching Session 7 Materials: SD learning from the design an | 5/30/2025 |
| 4.1 4.1.9.12 | Stakeholder Feedback Survey: SD learning from the design an | 10/31/2025 |
| 4.1 4.1.9.13 | South Dakota teacher apprenticeship phase 3 proposal adden | 12/30/2024 |
| 4.1 4.1.9.2 | Project Proposal: Design of the Mentoring Component of the | 6/30/2023 |
| 4.1 4.1.9.3 | Coaching Session 1 Materials: Coaching to Apply insights from | 6/12/2023 |
| 4.1 4.1.9.4 | Limited Literature Scan Materials: Identifying and summarizin | 6/12/2023 |
| 4.1 4.1.9.5 | Coaching Session 2 Materials: Collaboratively collecting, inter | 12/29/2023 |
| 4.1 4.1.9.6 | Coaching Session 3 Materials: Collaborative collecting, interp | 2/29/2024 |
| 4.1 4.1.9.7 | Stakeholder Feedback Survey: SD learning from the design an | 3/29/2024 |
| 4.1 4.1.9.8 | Coaching session 4 materials: SD learning from the design an | 4/30/2024 |
| 4.1 4.1.9.9 | Coaching Session 5 Materials: SD Learning from the design an | 9/30/2024 |
| 4.2 4.2.1.1 | AAE 1 proposal | 7/29/2022 |
| 4.2 4.2.1.2 | AAE MO Teacher Survey | 8/19/2022 |
| 4.2 4.2.1.3 | AAE 1 Summary | 9/14/2022 |
| 4.2 4.2.10.1 | AAE Proposal - SD Math Instruction | 4/9/2024 |
| 4.2 4.2.10.2 | AAE Materials- SD Math Instruction | 4/25/2024 |
| 4.2 4.2.10.3 | AAE Summary- SD Math Instruction | 5/3/2024 |
| 4.2 4.2.11.1 | AAE Proposal- SD chronic absenteeism | 6/14/2024 |
| 4.2 4.2.11.2 | AAE Materials- SD chronic absenteeism | 7/19/2024 |
| 4.2 4.2.11.3 | AAE Summary- SD chronic absenteeism | 8/2/2024 |

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| 4.2 4.2.12.1 | KSDE School Improvement AAE proposal | 9/11/2024 |
| 4.2 4.2.12.2 | KSDE School Improvement AAE materials | 10/23/2024 |
| 4.2 4.2.12.3 | KSDE School Improvement AAE summary | 11/6/2024 |
| 4.2 4.2.13.1 | MODESE Teacher Mentoring AAE proposal | 10/1/2024 |
| 4.2 4.2.13.2 | MODESE Teacher Mentoring AAE materials | 11/18/2024 Updated due date; AAE meeting s |
| 4.2 4.2.13.3 | MODESE Teacher Mentoring AAE summary | 12/9/2024 Updated due date; AAE meeting s |
| 4.2 4.2.14.1 | DPS CTE AAE proposal | 10/15/2024 |
| 4.2 4.2.14.2 | DPS CTE AAE materials | 11/22/2024 |
| 4.2 4.2.14.3 | DPS CTE AAE summary | 12/31/2024 |
| 4.2 4.2.2.1 | AAE 2 Quarterly REL Central Summary | 3/31/2023 |
| 4.2 4.2.3.1 | AAE Wyoming Teacher Retention Proposal | 1/5/2023 |
| 4.2 4.2.3.2 | AAE Wyoming Teacher Retention Summary and PowerPoint | 2/1/2023 |
| 4.2 4.2.3.3 | AAE WY Teacher Retention Summary | 3/14/2023 |
| 4.2 4.2.4.1 | AAE South Dakota Proposal | 3/16/2023 |
| 4.2 4.2.4.2 | AAE South Dakota PowerPoint | 4/28/2023 |
| 4.2 4.2.4.3 | AAE South Dakota SFS and Summary | 4/28/2023 |
| 4.2 4.2.5.1 | AAE KS Proposal | 6/9/2023 |
| 4.2 4.2.5.2 | AAE KS Written Summaries of the information collected and a | 6/30/2023 |
| 4.2 4.2.5.3 | AAE KS Summary | 7/31/2023 |
| 4.2 4.2.6.1 | AAE Proposal - DPS Math Discourse | 9/27/2023 |
| 4.2 4.2.6.2 | AAE Materials - DPS Math Discourse | 10/18/2023 |
| 4.2 4.2.6.3 | AAE Summary - DPS Math Discourse | 11/9/2023 |
| 4.2 4.2.7.1 | AAE Proposal - Wyoming Student Micro-Credentials | 11/13/2023 |

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| 4.2 | 4.2.7.2 | AAE Materials - WY Student Micro-Credentials | 1/9/2024 | |
| 4.2 | 4.2.7.3 | AAE Summary - WY Student Micro-Credentials | 1/23/2024 | |
| 4.2 | 4.2.8.1 | AAE Proposal - CDE Reduced Calendar | 12/27/2023 | |
| 4.2 | 4.2.8.2 | AAE Materials - CDE Reduced Calendar | 1/24/2024 | |
| 4.2 | 4.2.8.3 | AAE summary- CDE reduced school week | 2/7/2024 | |
| 4.2 | 4.2.9.1 | AAE Proposal - MO Teacher Induction | 1/17/2024 | |
| 4.2 | 4.2.9.2 | AAE Materials - MO Teacher Induction | 2/13/2024 | |
| 4.2 | 4.2.9.3 | AAE summary- MO Teacher Induction | 2/27/2024 | |
| 5.1 | 5.1.10.1 | LPS Factors that shape students' pathways to taking and succ | 6/14/2024 | |
| 5.1 | 5.1.10.2 | LPS Factors that shape students' pathways to taking and succ | 8/30/2024 | |
| 5.1 | 5.1.2.10 | Algebra toolkit study: Teacher orientation materials | 7/25/2024 | |
| 5.1 | 5.1.2.2 | Algebra Toolkit Efficacy Study Proposal | 9/29/2022 | |
| 5.1 | 5.1.2.3 | Toolkit Study: Data Sharing agreement or memorandum of u | 7/31/2024 | |
| 5.1 | 5.1.2.4 | Toolkit Study: Toolkit evaluation draft OMB | 10/31/2023 | |

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| | | clearance packag | |
| 5.1 | 5.1.2.5 | Toolkit Study: Toolkit evaluation draft OMB clearance packag | 4/28/2023 |
| 5.1 | 5.1.2.6 | Toolkit Study: Algebra toolkit efficacy study data collection in | 6/30/2023 |
| 5.1 | 5.1.2.7 | Toolkit Study: Toolkit evaluation white paper | 5/31/2026 |
| 5.1 | 5.1.2.8 | Algebra Toolkit Efficacy Study IRB application | 12/29/2023 |
| 5.1 | 5.1.2.9 | Algebra toolkit study: Facilitator orientation materials | 7/10/2024 |
| 5.1 | 5.1.5.1 | Project concept paper: Colorado Teacher Pipeline Study | 9/23/2022 |
| 5.1 | 5.1.6.1 | Project Concept Paper: MO Statewide Study to Identify Prom | 12/20/2022 |
| 5.1 | 5.1.6.2 | Project Proposal: MO Statewide Study to Identify Promising M | 1/31/2023 |
| 5.1 | 5.1.6.3 | MOU/DSA: MO Statewide Study to Identify Promising Mento | 12/29/2023 |
| 5.1 | 5.1.6.4 | Draft Report: MO Statewide Study to Identify Promising Men | 12/31/2024 |
| 5.1 | 5.1.6.5 | MO Teacher mentoring study preliminary results memo | 10/11/2024 |
| 5.1 | 5.1.7.1 | Concept Paper: DPS Better Understanding the retrospective e | 11/4/2022 |
| 5.1 | 5.1.7.2 | Project Proposal: DPS Better Understanding the retrospective | 4/28/2023 |
| 5.1 | 5.1.7.3 | MOU/DSA: DPS Better Understanding the retrospective expe | 12/29/2023 |
| 5.1 | 5.1.7.4 | Memo: DPS Better Understanding the retrospective experien | 4/2/2024 |
| 5.1 | 5.1.7.5 | Draft Report: DPS Better Understanding the retrospective experiences of grade 9 students who are or are not successful in math | 11/12/2024 |
| 5.1 | 5.1.8.1 | Concept Paper: Understanding Implementation of IPS in Kans | 9/29/2023 |
| 5.1 | 5.1.8.2 | Project Proposal: Understanding Implementation of IPS in Ka | 12/29/2023 |
| 5.1 | 5.1.8.3 | MOU/DSA: Understanding Implementation of IPS in Kansas | 4/30/2024 |
| 5.1 | 5.1.8.4 | IRB Approval or exemption: Understanding Implementation o | 3/29/2024 |
| 5.1 | 5.1.8.5 | Report: Understanding Implementation of IPS in Kansas | 4/30/2025 Updated due date |
| 5.2 | 5.2.1.2 | Proposal for toolkit to support evidence-based Algebra instru | 5/18/2022 |
| 5.2 | 5.2.1.3 | Toolkit Development Recruitment One-Pager | 8/3/2022 |
| 5.2 | 5.2.1.4 | Toolkit Development Storyboard and Script | 10/27/2022 |
| 5.2 | 5.2.1.5 | Toolkit Development: Submit Toolkit | 5/31/2024 |
| 5.2 | 5.2.1.6 | Toolkit Development: Summary of revisions | 11/30/2025 |

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| | | to toolkit based o | |
| 6.2 | 6.2.1.1 | Proposal: Infographic on REL CE and SR Partnership | 7/8/2022 |
| 6.2 | 6.2.1.2 | Standing Rock Infographic Content | 7/29/2022 |
| 6.2 | 6.2.1.3 | Standing Rock Infographic | 8/12/2022 |
| 6.2 | 6.2.10.1 | Kansas Video Proposal | 8/8/2023 |
| 6.2 | 6.2.10.2 | Kansas IPS Video Materials | 8/30/2023 |
| 6.2 | 6.2.10.3 | Kansas IPS Final Video | 9/29/2023 |
| 6.2 | 6.2.11.1 | Teacher Apprenticeship Infographic Proposal | 9/27/2023 |
| 6.2 | 6.2.11.2 | Teacher Apprenticeship Infographic | 11/30/2023 |
| 6.2 | 6.2.13.1 | Proposal: North Dakota Developing Math Achievement Infogr | 10/1/2025 |
| 6.2 | 6.2.13.2 | Draft: North Dakota Developing Math Achievement Infograp | 11/28/2025 |
| 6.2 | 6.2.17.1 | Proposal: Kansas Supporting Postsecondary and Workforce R | 10/1/2024 |
| 6.2 | 6.2.17.2.1 | Draft: Guide 1 of Kansas Supporting Postsecondary and Work | 11/29/2024 |
| 6.2 | 6.2.17.2.2 | Final: Guide 1 of Kansas Supporting Postsecondary and Workf | 1/31/2025 |
| 6.2 | 6.2.17.3.1 | Draft: Guide 2 of Kansas Supporting Postsecondary and Workforce Readiness Infographic series | 11/29/2024 |
| 6.2 | 6.2.17.3.2 | Final: Guide 2 of Kansas Supporting Postsecondary and Workf | 1/31/2025 |
| 6.2 | 6.2.17.4.1 | Draft: Guide 3 of Kansas Supporting Postsecondary and Work | 11/29/2024 |
| 6.2 | 6.2.17.4.2 | Final: Guide 3 of Kansas Supporting Postsecondary and Workf | 1/31/2025 |
| 6.2 | 6.2.19.1 | CO RCY product proposal | 10/31/2025 |

| Subtask number | Deliverable Name | Contract due date | Notes |
|----------------|--|-------------------|-------|
| 6.2 6.2.19.2 | CO RCY product draft | 11/30/2025 | |
| 6.2 6.2.19.3 | CO RCY product final | 12/31/2025 | |
| 6.2 6.2.20.1 | NDE Foundational literacy product proposal | 10/31/2025 | |
| 6.2 6.2.20.2 | NDE Foundational literacy product draft | 11/30/2025 | |
| 6.2 6.2.20.3 | NDE Foundational literacy product final | 12/31/2025 | |
| 6.2 6.2.21.1 | LPS honors courses product proposal | 10/31/2025 | |
| 6.2 6.2.21.2 | LPS honors courses product draft | 11/30/2025 | |
| 6.2 6.2.21.3 | LPS honors courses product final | 12/31/2025 | |
| 6.2 6.2.22.1 | Teton math product proposal | 10/31/2025 | |
| 6.2 6.2.22.2 | Teton math product draft | 11/30/2025 | |
| 6.2 6.2.22.3 | Teton math product final | 12/31/2025 | |
| 6.2 6.2.23.1 | Regional Apprenticeship 6.2 product proposal | 12/20/2024 | |
| 6.2 6.2.23.2 | Regional Apprenticeship 6.2 product draft | 1/10/2025 | |
| 6.2 6.2.23.3 | Regional Apprenticeship 6.2 product final | 2/28/2025 | |
| 6.2 6.2.24.1 | WY teacher apprenticeship 6.2 product proposal | 10/31/2025 | |

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| 6.2 6.2.24.2 | WY teacher apprenticeship 6.2 product draft | 11/30/2025 |
| 6.2 6.2.24.3 | WY teacher apprenticeship 6.2 product final | 12/31/2025 |
| 6.2 6.2.25.1 | MO Teacher retention product proposal | 10/31/2025 |
| 6.2 6.2.25.2 | MO Teacher retention product draft | 11/30/2025 |
| 6.2 6.2.25.3 | MO Teacher retention product final | 12/31/2025 |
| 6.2 6.2.26.1 | SD teacher apprenticeship product proposal | 10/31/2025 |
| 6.2 6.2.26.2 | SD teacher apprenticeship product draft | 11/30/2025 |
| 6.2 6.2.26.3 | SD teacher apprenticeship product final | 12/31/2025 |
| 6.2 6.2.2.1 | Proposal: Fact Sheet on Culture-Based education and effect m | 9/9/2022 |
| 6.2 6.2.2.2 | Fact sheet on Culture-based education and effect models of P | 11/30/2022 |
| 6.2 6.2.3.1 | Proposal: Fact sheet Supporting School Transformation | 11/1/2022 |
| 6.2 6.2.4.1 | Proposal: KS understanding IPS infographic or fact sheet | 10/28/2022 |
| 6.2 6.2.4.2 | Final: KS Understanding IPS Infographic | 5/31/2023 |
| 6.2 6.2.8.1 | Proposal: IPS Goal Setting and Portfolio Fact Sheet | 4/28/2023 |
| 6.2 6.2.8.2 | Final: IPS Goal setting and portfolio fact sheet | 5/31/2023 |
| 6.2 6.2.9.1 | Draft: ND Evidence-Based strategies for differentiated instruc | 12/9/2022 |
| 6.2 6.2.9.2 | Final: ND Evidence-Based strategies for differentiated instruc | 12/21/2022 |
| 6.3 6.3.1 | NNERPP conference materials | 7/5/2022 |
| 6.3 6.3.10.1 | NDIES Conference Proposal | 4/1/2024 |
| 6.3 6.3.10.2 | NDIES Conference Materials | 7/3/2024 |
| 6.3 6.3.11.1 | CASE Conference presentation abstract | 4/4/2024 |
| 6.3 6.3.12.1 | SD Teacher apprenticeship webinar proposal | 7/31/2024 |
| 6.3 6.3.12.2 | SD Teacher apprenticeship webinar materials | 11/15/2024 |
| 6.3 6.3.12.3 | SD Webinar Post Event Materials | 12/13/2024 |
| 6.3 6.3.13.1 | SR AERA Poster Session Proposal | 7/26/2024 |
| 6.3 6.3.14.1 | CO AERA Place-Based Paper Proposal | 7/26/2024 |
| 6.3 6.3.15.1 | Teacher Apprenticeship AERA Poster Session Proposal | 7/26/2024 |
| 6.3 6.3.16.1 | SXSW EDU 2025 conference proposal | 7/18/2024 |
| 6.3 6.3.16.2 | SXSW conference materials | 2/3/2025 |
| 6.3 6.3.17.1 | 2025 NCTM conference cross-REL toolkit workshop proposal | 10/4/2024 |
| 6.3 6.3.18.1 | WY / ND / SD joint apprenticeship webinar proposal | 7/1/2025 |
| 6.3 6.3.18.2 | WY / ND / SD joint apprenticeship webinar materials | 8/1/2025 |
| 6.3 6.3.18.3 | WY / ND / SD joint apprenticeship post-webinar materials | 9/1/2025 |
| 6.3 6.3.19.1 | NIEA conference proposal | 8/1/2025 |
| 6.3 6.3.2 | NNERPP conference summary | 8/3/2022 |
| 6.3 6.3.3 | Teacher diversity webinar proposal | 12/14/2022 |
| 6.3 6.3.4 | Teacher diversity webinar agenda and materials | 2/6/2023 |

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| 6.3 6.3.5 | Teacher diversity webinar summary | 3/27/2023 |
| 6.3 6.3.6.1 | Webinar Proposal: Colorado Pipeline Webinar | 1/15/2023 |
| 6.3 6.3.6.2 | Webinar Agenda and Materials: Colorado Pipeline Webinar | 3/8/2023 |
| 6.3 6.3.6.3 | Webinar Summary: Colorado Pipeline Webinar | 4/19/2023 |
| 6.3 6.3.7.1 | Webinar Proposal: Webinar on culture-based education, evid | 10/31/2023 |
| 6.3 6.3.7.2 | Webinar Agenda and Materials: Webinar on culture-based ed | 12/8/2023 |
| 6.3 6.3.8.1 | Conference Proposal: CTE Proposal | 11/10/2023 |
| 6.3 6.3.8.2 | CTE Conference Materials | 1/22/2024 |
| 6.3 6.3.9.1 | Learning Forward Conference Proposal-Standing Rock presen | 1/17/2024 |

| Subtask Deliverable number | Deliverable Name | Contract due date | Notes |
|----------------------------|--|-------------------|-------|
| 6.4 6.4.1.1 | Draft newsletter (Summer 2022) | 6/3/2022 | |
| 6.4 6.4.1.2 | Disseminate Final Newsletter (Summer 2022) | 6/30/2022 | |
| 6.4 6.4.10 | Fall 2024 Newsletter | 9/6/2024 | |
| 6.4 6.4.11 | Winter 2024 Newsletter | 12/6/2024 | |
| 6.4 6.4.12 | Spring 2025 Newsletter | 3/1/2025 | |
| 6.4 6.4.13 | Summer 2025 Newsletter | 5/31/2025 | |
| 6.4 6.4.14 | Fall 2025 Newsletter | 9/1/2025 | |
| 6.4 6.4.15 | Winter 2025 Newsletter | 12/1/2025 | |
| 6.4 6.4.2.1 | Draft newsletter (Fall 2022) | 9/2/2022 | |
| 6.4 6.4.3.1 | Draft Newsletter (Winter 2022) | 11/18/2022 | |
| 6.4 6.4.3.2 | Final Newsletter (Winter 2022) | 12/30/2022 | |
| 6.4 6.4.4.1 | Draft Newsletter (Spring 2023) | 3/3/2023 | |
| 6.4 6.4.4.2 | Final Newsletter (Spring 2023) | 3/31/2023 | |
| 6.4 6.4.5.1 | Draft Summer Newsletter 2023 | 6/1/2023 | |
| 6.4 6.4.5.2 | Final Summer Newsletter 2023 | 6/30/2023 | |
| 6.4 6.4.6.1 | Draft Fall Newsletter | 9/1/2023 | |
| 6.4 6.4.6.2 | Final Fall Newsletter 2023 | 9/29/2023 | |
| 6.4 6.4.7.1 | Draft Winter Newsletter 2023 | 12/1/2023 | |
| 6.4 6.4.7.2 | Final Winter Newsletter 2023 | 12/29/2023 | |
| 6.4 6.4.8 | Spring 2024 Newsletter | 3/1/2024 | |
| 6.4 6.4.9 | Summer 2024 Newsletter | 5/31/2024 | |
| 6.5 6.5.1.1 | Blog 1 | 7/29/2022 | |
| 6.5 6.5.1.10 | Blog 10: DPS Mathematical Discourse | 7/31/2024 | |
| 6.5 6.5.1.11 | Blog 11: SR | 12/27/2024 | |
| 6.5 6.5.1.12 | Blog 12 - SD Apprenticeship work | 12/27/2024 | |
| 6.5 6.5.1.13 | Blog: Topic TBD | 2/28/2025 | |
| 6.5 6.5.1.14 | Blog: Topic TBD | 4/30/2025 | |
| 6.5 6.5.1.15 | Blog: Topic TBD | 6/30/2025 | |
| 6.5 6.5.1.16 | Blog: Topic TBD | 8/29/2025 | |
| 6.5 6.5.1.17 | Blog: Topic TBD | 10/31/2025 | |

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| 6.5 6.5.1.18 | Blog: Topic TBD | 12/31/2025 |
| 6.5 6.5.1.2 | Blog 2 | 8/24/2022 |
| 6.5 6.5.1.3 | Blog 3 | 10/10/2022 |
| 6.5 6.5.1.4 | Blog 4 | 12/14/2022 |
| 6.5 6.5.1.5 | Blog 5 (DPS) | 4/28/2023 |
| 6.5 6.5.1.6 | Blog 6 (South Dakota Highlight) | 8/31/2023 |
| 6.5 6.5.1.7 | Blog 7 (Wyoming Highlight) | 10/31/2023 |
| 6.5 6.5.1.8 | Blog 8 | 12/29/2023 |
| 6.5 6.5.1.9 | Blog 9: CO Diversity | 7/31/2024 |
| 6.6 6.6.1.01 | Social media posts | 3/31/2022 |
| 6.6 6.6.1.02 | Social media posts | 4/29/2022 |
| 6.6 6.6.1.03 | Social media posts | 5/31/2022 |
| 6.6 6.6.1.04 | Social media posts | 6/30/2022 |
| 6.6 6.6.1.05 | Social media posts | 7/31/2022 |
| 6.6 6.6.1.06 | Social media posts | 8/31/2022 |
| 6.6 6.6.1.07 | Social media posts | 9/30/2022 |
| 6.6 6.6.1.08 | Social media posts | 10/28/2022 |
| 6.6 6.6.1.09 | Social media posts | 11/30/2022 |
| 6.6 6.6.1.10 | Social media posts | 12/30/2022 |
| 6.6 6.6.1.11 | Social media posts | 1/31/2023 |
| 6.6 6.6.1.12 | Social Media Posts | 2/28/2023 |
| 6.6 6.6.1.13 | Social Media Posts | 3/31/2023 |
| 6.6 6.6.1.14 | Social Media Posts | 4/28/2023 |
| 6.6 6.6.1.15 | Social Media Posts | 5/31/2023 |
| 6.6 6.6.1.16 | Social Media Posts | 6/30/2023 |
| 6.6 6.6.1.17 | Social Media Posts | 7/31/2023 |
| 6.6 6.6.1.18 | Social Media Posts | 8/31/2023 |
| 6.6 6.6.1.19 | Social Media Posts | 9/29/2023 |
| 6.6 6.6.1.20 | Social Media Posts | 10/31/2023 |
| 6.6 6.6.1.21 | Social Media Posts | 11/30/2023 |
| 6.6 6.6.1.22 | Social Media Posts | 12/29/2023 |

| Subtask Deliverable number | Deliverable Name | Contract due date | Notes |
|----------------------------|--------------------|-------------------|-------|
| 6.6 6.6.1.23 | Social Media Posts | 1/31/2024 | |
| 6.6 6.6.1.24 | Social Media Posts | 2/29/2024 | |
| 6.6 6.6.1.25 | Social Media Posts | 3/29/2024 | |
| 6.6 6.6.1.26 | Social Media Posts | 4/30/2024 | |
| 6.6 6.6.1.27 | Social Media Posts | 5/31/2024 | |
| 6.6 6.6.1.28 | Social Media Posts | 6/28/2024 | |
| 6.6 6.6.1.29 | Social Media Posts | 7/31/2024 | |
| 6.6 6.6.1.30 | Social Media Posts | 8/30/2024 | |
| 6.6 6.6.1.31 | Social Media Posts | 9/30/2024 | |
| 6.6 6.6.1.32 | Social Media Posts | 10/31/2024 | |
| 6.6 6.6.1.33 | Social Media Posts | 11/29/2024 | |
| 6.6 6.6.1.34 | Social Media Posts | 12/31/2024 | |
| 6.6 6.6.1.35 | Social Media Posts | 1/31/2025 | |
| 6.6 6.6.1.36 | Social Media Posts | 2/28/2025 | |
| 6.6 6.6.1.37 | Social Media Posts | 3/31/2025 | |

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| 6.6 6.6.1.38 | Social Media Posts | 4/30/2025 |
| 6.6 6.6.1.39 | Social Media Posts | 5/31/2025 |
| 6.6 6.6.1.40 | Social Media Posts | 6/30/2025 |
| 6.6 6.6.1.41 | Social Media Posts | 7/31/2026 |
| 6.6 6.6.1.42 | Social Media Posts | 8/31/2025 |
| 6.6 6.6.1.43 | Social Media Posts | 9/30/2025 |
| 6.6 6.6.1.44 | Social Media Posts | 10/31/2025 |
| 6.6 6.6.1.45 | Social Media Posts | 11/30/2025 |
| 6.6 6.6.1.46 | Social Media Posts | 12/31/2025 |
| 6.7 6.7.1 | Templates | 6/1/2022 |
| 6.7 6.7.2.1 | REL Central brochure | 9/30/2022 |

Termination for Convenience

Memo to Contract File

02/10/2025

(Fill in Date of this Memo)

Contract # 91990022C0015

Mod #P00009 (This is a unilateral mod)

☐ This is a commercial (FAR Part 12) ____ contract ____ order; the termination clause in the contract (including GSA schedule contracts) is 52.212-4

☒ This is a Part 15 contract; select from below list to indicate which T4C clause is in the contract:

☐ 52.249-1 Termination for Convenience of the Government (Fixed Price) (Short Form)

☐ 52.249-2 Termination for Convenience of the Government (Fixed-Price)

☐ 52.249-4 Termination for Convenience of the Government (Services) (Short Form)

☐ 52.249-5 Termination for Convenience of the Government (Educational and Other Nonprofit Institutions)

☒ 52.249-6 Termination for Convenience of the Government (Cost Reimbursement)

☒ The government's requirements have changed (i.e., there is no longer a need for the supplies or services), and as a result the Contracting Officer has determined that termination of this contract is in the best interest of the government.

Note: See Sample Mod Text (on the following pages, select mod text which corresponds to the termination clause authority you are using to execute the termination for convenience).

Upon execution of the mod CO/CS will complete FPDS-NG Contract Action Report.

Process steps after issuance of termination for convenience:

☐ Was a "no cost" mutual agreement reached, and a modification issued as evidence?

If applicable, receipt date of contractor's settlement proposal:

If a "no cost" mutual settlement was not achieved, proceed to mutually agree on settlement amount. Follow FAR guidance. If mutual agreement cannot be reached, CO will proceed to issue a unilateral settlement determination modification. See following pages for sample settlement mod text.

SAMPLE TERMINATION MOD TEXT

Select the mod text that corresponds with the termination clause authority you are using in Box 13.D. of your mod.

- **Sample Mod text for Commercial contract (FAR Part 12) termination:**

Pursuant to clause 52.212-4, Contract Terms and Conditions – Commercial Products and Commercial Services, paragraph (I), this contract is hereby terminated effective [REDACTED], in whole, for the Government's convenience. The contractor must stop all work immediately on the effective date and must immediately cause all of its suppliers and subcontractors to cease work.

In accordance with FAR clause 52.212-4 paragraph (I), you are to submit a termination settlement proposal to the Contracting Officer. You are requested to submit this settlement proposal no later than 02/13/2025.

The contractor will not be paid for work performed beyond the termination effective date noted above or for incurred costs which could reasonably have been avoided.

- **Sample Mod text for Part 15 contract termination for convenience (if the contract contains 52.249-2; 52.249-5; or 52.249-6):**

Pursuant to clause 52.249-6, Termination (Cost-Reimbursement), this contract is hereby terminated effective 02/13/2025, in whole, for the Government's convenience. The contractor must stop all work immediately on the effective date, must immediately cause all of its suppliers and subcontractors to cease work, and proceed with any contractor obligations set forth in the referenced clause including submission of a final termination settlement proposal. Per the referenced clause, the contractor shall submit the proposal promptly, but no later than 1 year from the effective date of the termination, unless extended in writing by the Contracting Officer.

- **Sample mod text for Termination for Convenience when the contract contains a Short Form termination clause (i.e., 52.249-1 or 52.249-4). These clauses are very brief. If 52.249-4 is in the contract, termination settlement charges are limited to services rendered before the effective date of the termination. If 52.249-1 is in the contract, any compensation due to the contractor shall be in accordance with FAR Part 49.**

Pursuant to FAR clause 52.249- (CO to fill in clause # and title of the clause), this contract is hereby terminated in full effective [REDACTED].

SAMPLE SETTLEMENT MOD TEXT

Sample Settlement Mod Text (Fixed-Price):

- (a) *This supplemental agreement settles the settlement proposal resulting from the Notice of Termination dated <insert date>.*
- (b) *The parties agree to the following:*
- (1) *The contractor certifies that all contract termination inventory (including scrap) has been retained or acquired by the contractor, sold to third parties, returned to suppliers, delivered to or stored for the government, or otherwise properly accounted for, and all proceeds and retention credits have been used in arriving at this agreement.*
 - (2) *The contractor certifies that each immediate subcontractor, whose settlement proposal is included in the proposal settled by this agreement, has furnished the contractor a certificate stating that—*
 - (i) *All subcontract termination inventory (including scrap) has been retained or acquired by the subcontractor, sold to third parties, returned to suppliers, delivered to or stored for the government, or otherwise properly accounted for, and all proceeds and retention credits were used in arriving at the settlement of the subcontract, and*
 - (ii) *The subcontractor has received a similar certificate from each immediate subcontractor whose proposal was included in its proposal.*
 - (3) *The contractor certifies that all items of termination inventory, the costs of which were used in arriving at the amount of this settlement or the settlement of any subcontract settlement proposal included in this settlement, (1) are properly allocable to the terminated portion of the contract; (2) do not exceed the reasonable quantitative requirements of the terminated portion of the contract; and (3) do not include any items reasonably usable without loss to the contractor on its other work. The contractor further certifies that the contracting officer (CO/KO) has been informed of any substantial change in the status of the items between the dates of the termination inventory schedules and the date of this agreement.*
 - (4) *The contractor transfers, conveys, and assigns to the government all the rights, titles, and interests, if any, the contractor has received or is entitled to receive, in and to subcontract termination inventory not otherwise properly accounted for.*
 - (5) *The contractor shall, within 10 days after receipt of the payment specified in this agreement, pay to each of its immediate subcontractors (or their respective assignees) the amounts to which they are entitled after deducting any prior payments and, if the contractor so elects, any amounts due and payable to the contractor by those subcontractors.*
 - (6)
 - (i) *The contractor has received \$<insert amount> for work and services performed or items delivered under the completed portion of the contract. The government confirms the right of the contractor, subject to paragraph (7) of this section, to retain this sum and agrees that it constitutes a portion of the total amount to which the contractor is entitled in complete and final settlement of the contract.*

- (ii) Further, the government agrees to pay to the contractor or its assignee, upon presentation of a proper invoice or voucher, the sum of \$<insert net amount of settlement>, arrived at by deducting from the sum of \$<insert amount as follows: for proposals on an inventory basis insert gross amount of settlement; for proposals on a total cost basis, insert gross amount of settlement less amount shown in subdivision (6)(i) of this subsection>—
 - (A) The amount of \$<insert amount> for all unliquidated partial or progress payments previously made to the contractor or its assignee and all unliquidated advance payments (with any interest),
 - (B) The amount of \$<insert amount> for all applicable property disposal credits [insert if appropriate, “and (C) the amount of \$<insert amount> for all other amounts due the Government under this contract, except as provided in paragraph (7) of this section.”]
 - (iii) The net settlement of \$<insert amount> in subdivision (ii) of this section, together with sums previously paid, constitutes payment in full and complete settlement of the amount due the contractor for the complete termination of the contract and all other demands and liabilities of the contractor and the government under the contract, except as provided in paragraph (b)(7) of this section.
- (7) Regardless of any other provision of this agreement, the following rights and liabilities of the parties under the contract are reserved: [The following list of reserved or excepted rights and liabilities is intended to cover those that should most frequently be reserved and scrutinized at the time a settlement agreement is negotiated (see [FAR 49.109-2](#)). The suggested language of the excepted items on the list may be varied at the discretion of the CO. If accuracy or completeness can be achieved by referencing the number of a contract clause or provision covering the matter in question, then follow that method of enumerating reserved rights and liabilities. Omit any of the following that are not applicable and add any additional exceptions or reservations required.]
- (i) All rights and liabilities, if any, of the parties as to matters covered by any renegotiation authority.
 - (ii) All rights of the government to take the benefit of agreements or judgments affecting royalties paid or payable in connection with the performance of the contract.
 - (iii) All rights and liabilities, if any, of the parties under those clauses inserted in the contract because of the requirements of acts of Congress and executive orders, including without limitation any applicable clauses relating to: labor law, contingent fees, domestic articles, and employment of aliens. [If the contract contains clauses of this character inserted for reasons other than requirements of acts of Congress or executive orders, the suggested language should be appropriately modified.]
 - (iv) All rights and liabilities of the parties arising under the contract and relating to reproduction rights, patent infringements, inventions, or applications for patents, including rights to assignments, invention reports, licenses, covenants of indemnity against patent risks, and bonds for patent indemnity obligations, together with all rights and liabilities under the bonds.
 - (v) All rights and liabilities of the parties arising under the contract or otherwise and concerning defects, guarantees, or warranties relating to any articles or

component parts furnished to the government by the contractor under the contract or this agreement.

- (vi) All rights and liabilities of the parties under the contract relating to any contract termination inventory stored for the government.*
- (vii) All rights and liabilities of the parties under agreements relating to the future care and disposition by the contractor of government-owned property remaining in the contractor's custody.*
- (viii) All rights and liabilities of the parties relating to government property furnished to the contractor for the performance of this contract.*
- (ix) All rights and liabilities of the parties under the contract relating to options (except options to continue or increase the work under the contract), covenants not to compete, and covenants of indemnity.*
- (x) All rights and liabilities, if any, of the parties under those clauses of the contract relating to price reductions for defective certified cost or pricing data.*

Sample Settlement Mod for Cost Reimbursement Contract Terminated for Convenience (if the settlement includes costs):

- (a) This supplemental agreement settles the settlement proposal resulting from the Notice of Termination dated *<insert date>*.
- (b) The parties agree to the following:
 - (1) The contractor certifies that all contract termination inventory (including scrap) has been retained or acquired by the contractor, sold to third parties, returned to suppliers, delivered to or stored for the government, or otherwise properly accounted for, and that all proceeds and retention credits have been used in arriving at this agreement.
 - (2) The contractor certifies that each immediate subcontractor, whose settlement proposal is included in the proposal settled by this agreement, has furnished the contractor a certificate stating that—
 - (i) All subcontract termination inventory (including scrap) has been retained or acquired by the subcontractor, sold to third parties, returned to suppliers, delivered to or stored for the government, or otherwise properly accounted for, and all proceeds and retention credits were used in arriving at the settlement of the subcontract; and
 - (ii) The subcontractor has received a similar certificate from each immediate subcontractor whose proposal was included in its proposal.
 - (3) The contractor certifies that all items of termination inventory, the costs of which were used in arriving at the amount of this settlement or the settlement of any subcontract settlement proposal included in this settlement, (1) are properly allocable to the terminated portion of the contract; (2) do not exceed the reasonable quantitative requirements of the terminated portion of the contract; and (3) do not include any items reasonably usable without loss to the contractor on its other work. The contractor further certifies that the contracting officer (CO/KO) has been informed of any substantial change in the status of the items between the dates of the termination inventory schedules and the date of this agreement.

- (4) The contractor transfers, conveys, and assigns to the government all the right, title and interest, if any, that the contractor has received or is entitled to receive, in and to subcontract termination inventory not otherwise properly accounted for.
- (5) The contractor shall, within 10 days after receipt of the payment specified in this agreement, pay to each of its immediate subcontractors (or their respective assignees) the amounts to which they are entitled after deducting any prior payments and, if the contractor so elects, any amounts due and payable to the contractor by those subcontractors.
- (6)
- (i) The contractor has received \$<insert amount> for work and services performed or articles delivered under the contract before the effective date of termination. The government confirms the right of the contractor, subject to paragraph (b)(7) of this section, to retain this sum and agrees that it constitutes a portion of the total amount to which the contractor is entitled in complete and final settlement of the contract.
 - (ii) Further, the government agrees to pay to the contractor or its assignee, upon presentation of a proper invoice or voucher, the sum of \$<insert net amount of settlement>, arrived at by deducting from the sum of \$<insert gross amount of settlement less amount shown in subdivision (6)(i)a of this section>—
 - (A) The amount of \$<insert amount> for all unliquidated partial or progress payments previously made to the contractor or its assignee and all unliquidated advance payments (with any interest),
 - (B) The amount of \$<insert amount> for all applicable property disposal credits <insert if appropriate, “and (C) the amount of \$<insert amount> for all other amounts due the Government under this contract, except as provided in paragraph (b)(7) of this section.”>
 - (iii) The net settlement of \$<insert amount> in subdivision (b)(6)(ii) of this section, together with sums previously paid, constitutes payment in full and complete settlement of the amount due the contractor for the complete termination of the contract and of all other demands and liabilities of the contractor and the government under the contract, except as provided in paragraph (b)(7) in this section.
- (7) Regardless of any other provision of this agreement, the following rights and liabilities of the parties under the contract are reserved: *[The following list of reserved or excepted rights and liabilities is intended to cover those that should most frequently be reserved and scrutinized at the time a settlement agreement is negotiated (see FAR 49.109-2). The suggested language of the excepted items on the list may be varied at the discretion of the CO. If accuracy or completeness can be achieved by referencing the number of a contract clause or provision covering the matter in question, then follow that method of enumerating reserved rights and liabilities. Omit any of the following that are not applicable and add any additional exceptions or reservations required.]*
- (i) All rights and liabilities, if any, of the parties as to matters covered by any renegotiation authority.
 - (ii) All rights of the government to take the benefit of agreements or judgments affecting royalties paid or payable in connection with the performance of the contract.

- (iii) All rights and liabilities, if any, of the parties under those clauses inserted in the contract because of the requirements of Acts of Congress and Executive orders, including without limitation any applicable clauses relating to: labor law, contingent fees, domestic articles, and employment of aliens. *[If the contract contains clauses of this character inserted for reasons other than requirements of Acts of Congress or Executive orders, the suggested language should be appropriately modified.]*
- (iv) All rights and liabilities of the parties arising under the contract and relating to reproduction rights, patent infringements, inventions, or applications for patents, including rights to assignments, invention reports, licenses, covenants of indemnity against patent risks, and bonds for patent indemnity obligations, together with all rights and liabilities under the bonds.
- (v) All rights and liabilities of the parties arising under the contract or otherwise and concerning defects, guarantees, or warranties relating to any articles or component parts furnished to the government by the contractor under the contract or this agreement.
- (vi) All rights and liabilities of the parties under the contract relating to any contract termination inventory stored for the government.
- (vii) All rights and liabilities of the parties under agreements relating to the future care and disposition by the contractor of government-owned property remaining in the contractor's custody.
- (viii) All rights and liabilities of the parties relating to government property furnished to the contractor for the performance of this contract.
- (ix) All rights and liabilities of the parties under the contract relating to options (except options to continue or increase the work under the contract), covenants not to compete, and covenants of indemnity.
- (x) Unresolved demands or assertions by the contractor against the government for costs under Government Accountability Office (GAO) exceptions or other costs of the same nature that are excluded from the settlement without prejudice to the rights of either party, as follows: *<insert amount and describe charges not waived.>*
- (xi) Claims by the contractor against the government, when the contractor's rights of reimbursement are disputed, that are excluded without prejudice to the rights of either party are as follows: *<insert the amounts and describe the claims on which the CO has made findings and has disallowed and on which the contractor has taken, or intends to take, timely appeal.>*
- (xii) Unresolved demands or assertions by the contractor against the government that are unknown in amount and involve costs alleged to be reimbursable under the contract are as follows: *<insert the estimated amounts and describe the charges.>*
- (xiii) Unknown amounts alleged by the contractor against the government based on responsibility of the contractor to third parties that involve costs reimbursable under the contract.
- (xiv) Debts due the government by the contractor that are based on refunds, rebates, credits, or other amounts not now known to the government with interest now due or that may become due the contractor from third parties, if the amounts arise out of transactions for which reimbursement has been

made to the contractor under the contract. The contractor shall pay to the government, within 30 days after receipt, any of these amounts that become due from any third party or any other source. Interest at the rate established by the Secretary of the Treasury under 50 USC (App.) 1215(b)(2) shall accrue and shall be paid to the government on any amounts that remain unpaid after the 30-day period.

- (xv) All rights and liabilities, if any, of the parties under those clauses of the contract relating to price reductions for defective certified cost or pricing data.

From: [Bone, Pamela](#)
To: lseldone@mathematica-Mpr.com
Cc: [Johnson, Amy](#); [Gibbs, Joseph](#)
Subject: FW: Modification P00009 of 91990022C0015 - T4C
Date: Thursday, February 13, 2025 5:32:00 PM
Attachments: [91990022C0015exe.pdf](#)

I apologize,
Please find enclosed modification P00009 for the above referenced contract.
Thank you,

Pamela Bone
Office Finance and Operations
U.S. Department of Education

Email: pamela.bone@ed.gov
Phone Number: (202) 987-0054

From: Bone, Pamela
Sent: Thursday, February 13, 2025 5:28 PM
To: lseldone@mathematica-Mpr.com
Cc: Johnson, Amy <Amy.Johnson@ed.gov>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>
Subject: Modification P00009 of 91990022C0015 - T4C

Good day,
Please find enclosed

Pamela Bone
Office Finance and Operations
U.S. Department of Education

Email: pamela.bone@ed.gov
Phone Number: (202) 987-0054

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

CONTRACT NO.

PAGE OF PAGES

1 1

| | | | | | | | |
|---|--|------------------------------------|--|--|--|--------------------------------|--|
| 2. AMENDMENT/MODIFICATION NO. P00009 | | 3. EFFECTIVE DATE See Block 16C | | 4. REQUISITION/PURCHASE REQ. NO. | | 5. PROJECT NO. (If applicable) | |
| 6. ISSUED BY US Department of Education 400 Maryland Avenue SW Washington DC 20202 | | CODE CAM | | 7. ADMINISTERED BY (If other than Item 6) | | CODE | |
| 8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) MATHEMATICA INC.(00000011) Attn: No Contact Available 600 ALEXANDER PARK PRINCETON NJ 085406346 | | | | (x) | | | |
| | | | | 9A. AMENDMENT OF SOLICITATION NO. | | | |
| | | | | 9B. DATED (SEE ITEM 11) | | | |
| | | | | x | | | |
| | | | | 10A. MODIFICATION OF CONTRACT/ORDER NO. 91990022C0015 | | | |
| | | | | 10B. DATED (SEE ITEM 13) 03/02/2022 | | | |
| CODE T41EGEAK2L35 | | FACILITY CODE | | | | | |

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended. ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

| | |
|-----------|---|
| CHECK ONE | A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A. |
| | B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). |
| | C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: |
| X | D. OTHER (Specify type of modification and authority) FAR 52.249-6, Termination (Cost-Reimbursement) |

E. IMPORTANT: Contractor ☐ is not. ☒ is required to sign this document and return _____ 1 _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

UEI: T41EGEAK2L35

Pursuant to clause 52.249-6, Termination (Cost-Reimbursement), this contract is hereby terminated effective 02/13/2025, in whole, for the Government's convenience. The contractor must stop all work immediately on the effective date, must immediately cause all of its suppliers and subcontractors to cease work, and proceed with any contractor obligations set forth in the referenced clause including submission of a final termination settlement proposal. Per the referenced clause, the contractor shall submit the proposal promptly, but no later than 1 year from the effective date of the termination, unless extended in writing by the Contracting Officer.

Period of Performance: 03/02/2022 to 02/13/2025

Except as provided herein, all terms and conditions of the document referenced in Item 9 A or 10A, as heretofore changed, remains unchanged and in full force and effect.

| | | | |
|---|--|---|--|
| 15A. NAME AND TITLE OF SIGNER (Type or print) Paula Conner | | 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Pamela W. Bone TEL: (202) 987-0054 EMAIL: Pamela.Bone@ed.gov | |
| 15B. CONTRACTOR/OFFEROR Paula Conner Date: 2025.02.14 06:00:26 -05'00' | | 16B. UNITED STATES OF AMERICA PAMELA BONE Date: 2025.02.13 17:14:00 -05'00' | |
| 15C. DATE SIGNED | | 16C. DATE SIGNED | |

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA
FAR (48 CFR) 53.216
ED 002819